Relativity®

User Manual

v6.6

August 27, 2010

kCura®

Contents

1 Overview

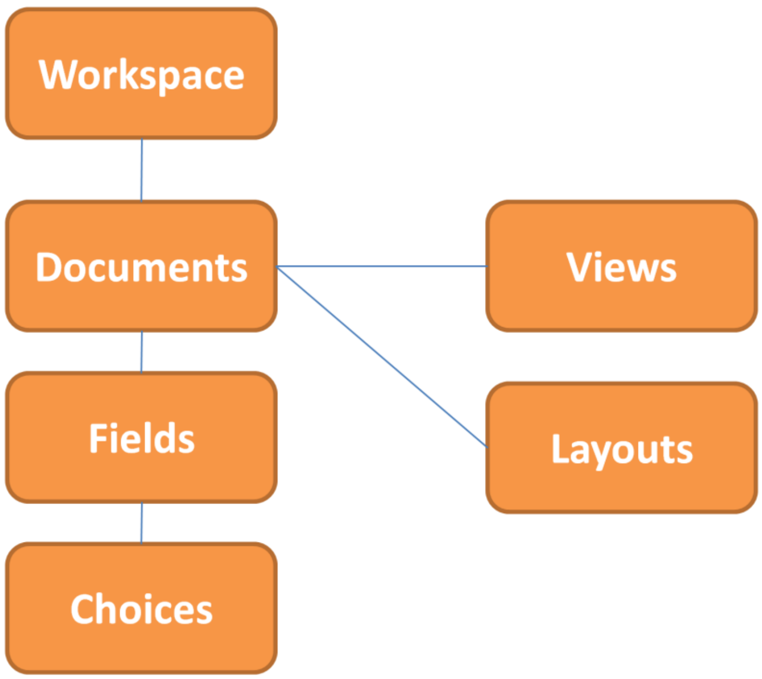
When working with Relativity as a user, it is important to familiarize yourself with the tool's many implementations.

This document outlines Relativity's structure and capabilities and guides you through the ways in which it can best be used for document review, from logging in to creating a word index inside a workspace.

2 Relativity Objects

Relativity is a flexible document-review platform customized by your Relativity administrator to provide an intuitive document review.

Each workspace consists of an interconnected set of objects.

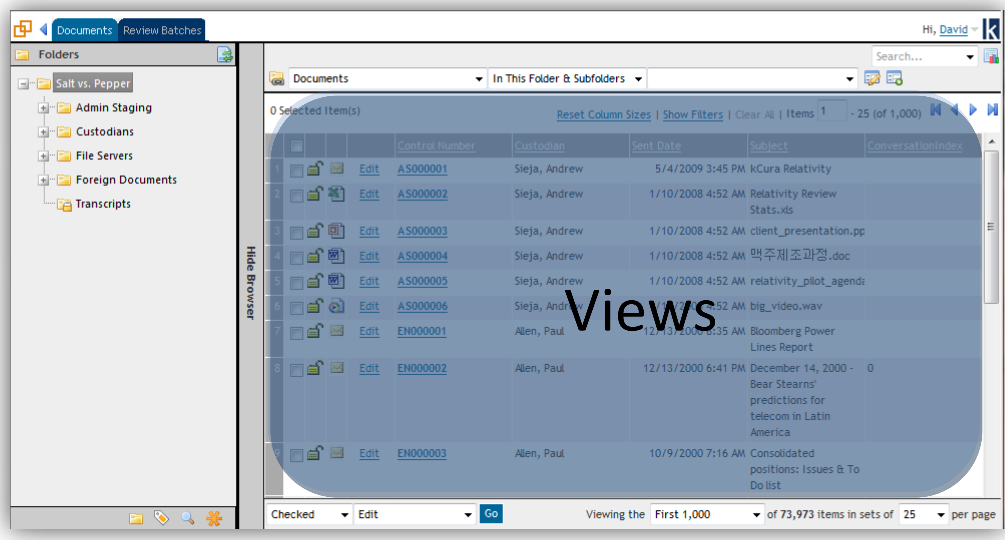


Relativity Objects

Each Workspace contains many Documents. Documents' information is stored in Fields. Fields may have predetermined sets of values you can select, called Choices in Relativity.

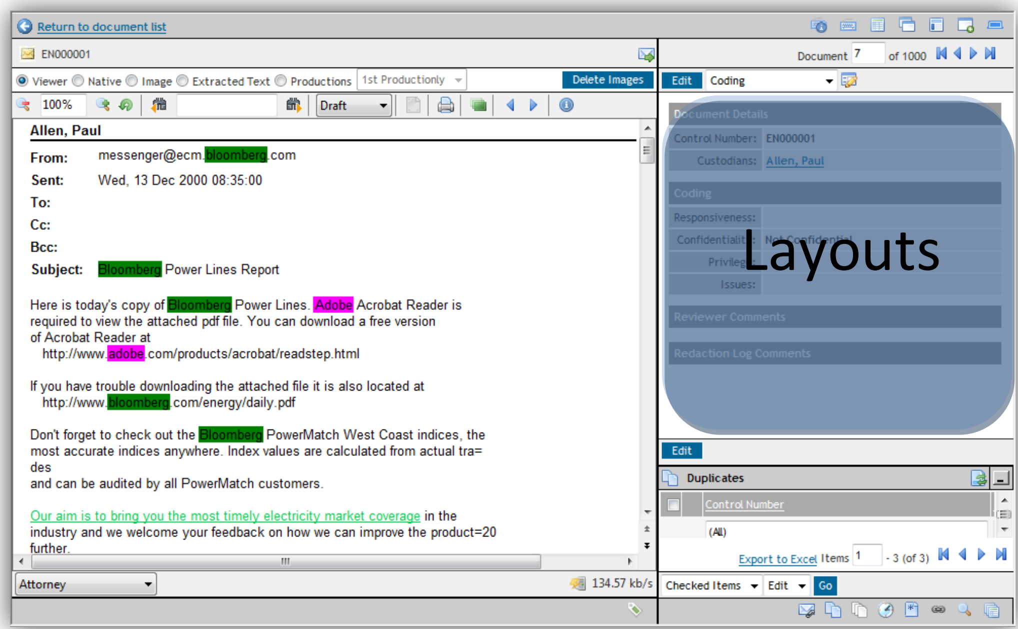
You can view or interact with documents using Views and Layouts.

Views are read-only lists of documents and are displayed in the item list manager.



Views Display

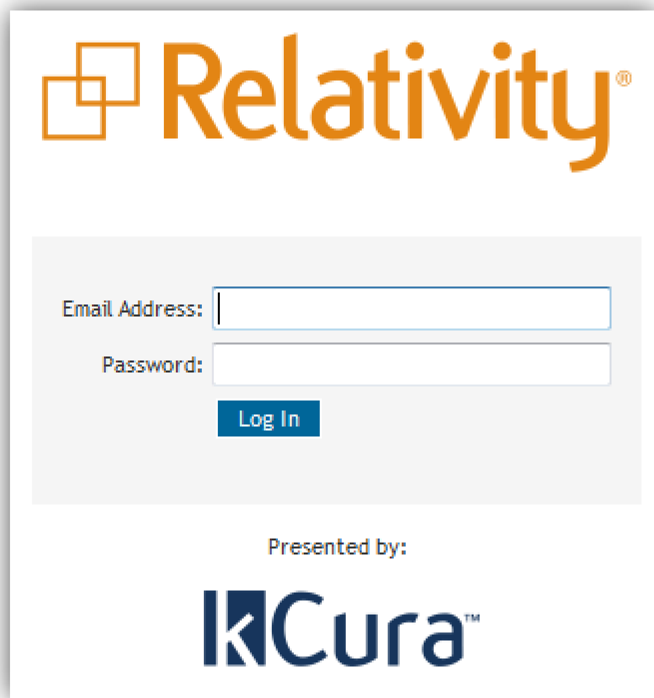
Layouts are editable, web-based coding forms that allow you to view and make changes to your documents’ fields.



Layouts Display

2.1 Logging In

To log into Relativity, browse to your Relativity website. If you do not know the correct address, contact your Relativity administrator. After you enter the address, the login screen appears.

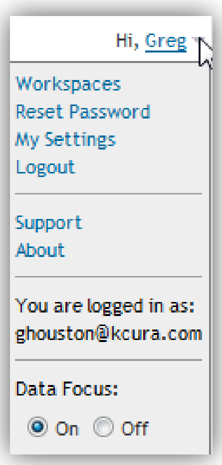


Login Screen

Enter your email address and password. If you do not know your login information, contact your Relativity administrator.

2.2 Reviewer Options

When you first log into Relativity, you see a list of your workspaces. You can click your name in the upper-right corner to see the mode dropdown.



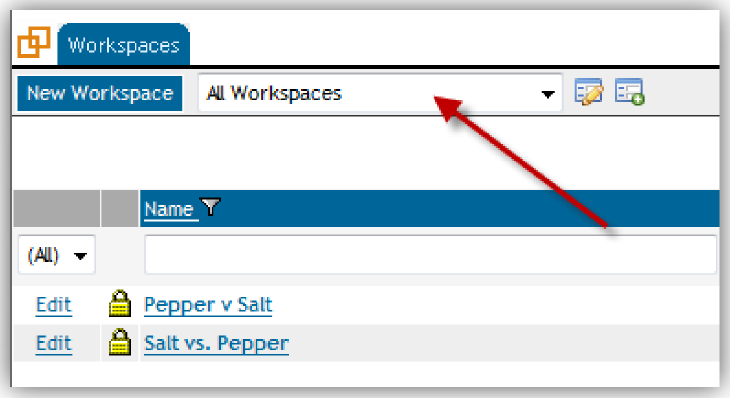
Mode Drop-down

By default, you will be in Workspaces mode, which displays your workspaces. Depending on your permissions, you may have the option to edit your settings or reset your password. If you do not see the modes, your Relativity administrator can change the settings.

2.3 Workspace Mode

Clicking on **Workspaces** in the mode bar, or logging in, brings you to a list of your workspaces.

If you don't see your workspace, check the view bar, shown by the red arrow below. The view bar controls which workspaces are displayed in the list.

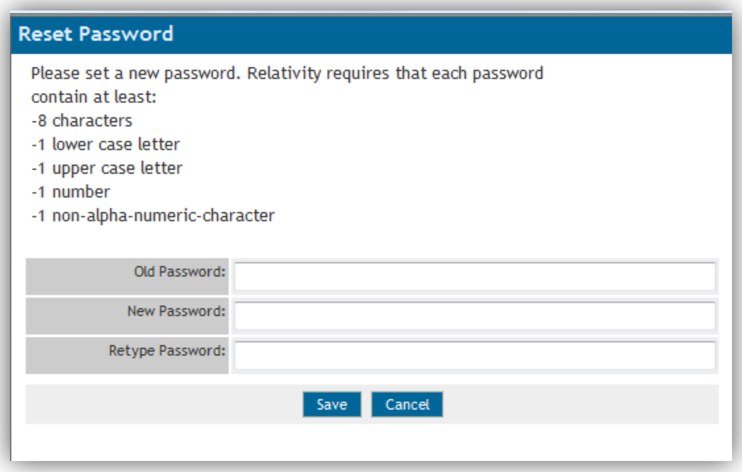


Workspaces View Bar

Try switching to different views to see if your workspace appears. If your workspace is unavailable, contact your Relativity administrator.

2.3.1 Reset Password

Clicking **Reset Password** mode takes you into a reset password mode pop-up, which allows you to enter a new password.



Reset Password Display

The Reset Password dialog box displays a list of instructions for creating a new password. It also displays a textbox where your old password should be entered, followed by two textboxes where your new password should be entered and verified.

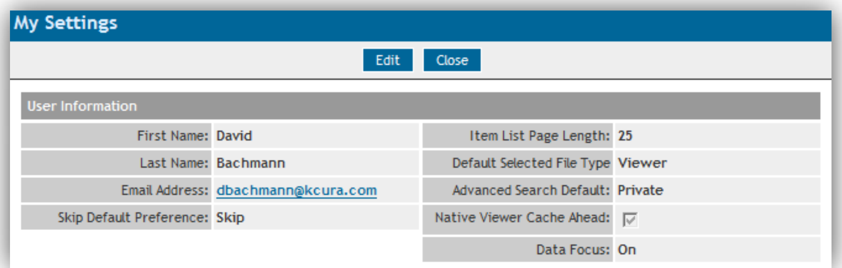
In the event that you receive a message stating, “Your password cannot be one of the last ## used passwords,” upon clicking save, you must use a different new password or contact your administrator.

Once you have entered your new password, click **Save**.

> The Reset Password dialog box will appear automatically if your password has expired.
>
> Your password’s expiration time and the number of previous passwords you are not able to reuse is determined by your system administrator.

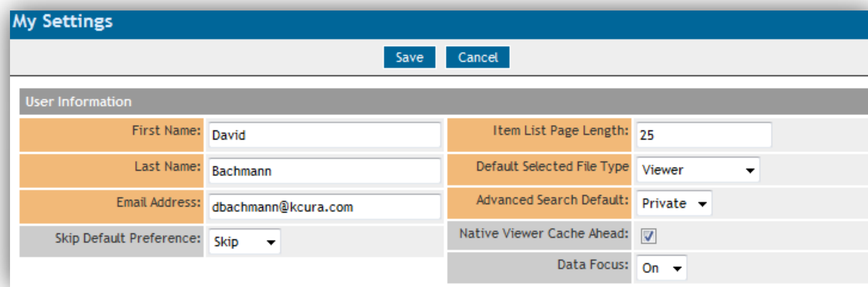
2.3.2 My Settings

Clicking on **My Settings** takes you into a settings mode pop-up, which displays your user information. Click **Edit** to change your settings.



My Settings Display

Clicking **Edit** allows you to edit your settings information**.** Note that all fields except Native Viewer Cache Ahead are required.



Edit My Settings

- **First name** is your first name.
- **Last name** is your last name.

Your first and last name will be used as your display name throughout Relativity.

- **Email address** is your email address and login.
- **Skip Default Preference** if changed from Normal to Skip will turn on the skip feature. When reviewing documents skip can eliminate a reviewer seeing documents already coded depending on the selected view.
- **Item list page length** is a numeric field indicating the default list length for all lists in Relativity. It can be set from 1 to 200.
- **Default selected file type** is the default viewer mode.
  - Viewer
  - Native
  - Image
  - Extracted text

- Production

- **Advanced Search Default** is your default search owner value. If the owner is set to Public, all users with rights to the search are able to see it. If the owner is set to Private, only you are able to see the search.

> Depending on your permissions, you may not have rights to edit the Advanced Search Default field.

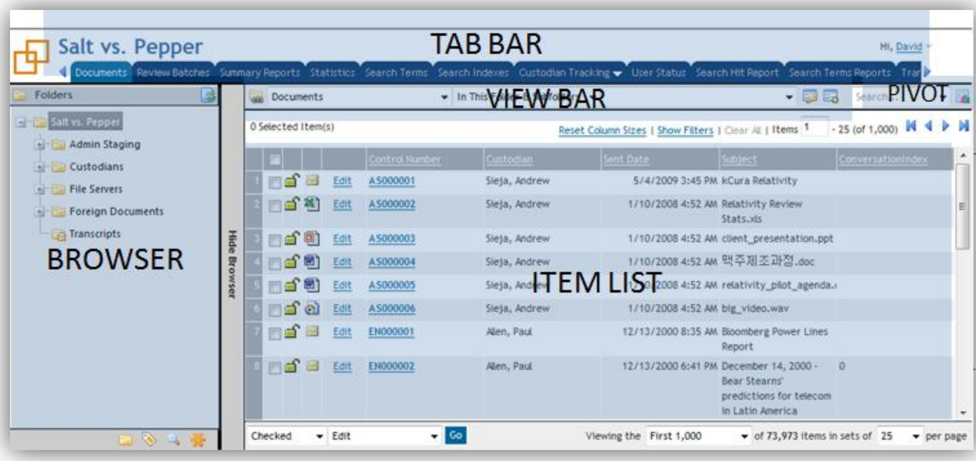
- **Native Viewer Cache Ahead**, if checked, pre-loads the next native document in your review queue once the active document is loaded.

Once you have changed any settings as needed, click **Save**.

3 Workspace

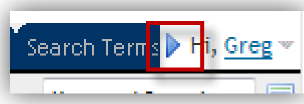
After logging into Relativity and selecting your workspace, you see the workspace documents tab. The workspace consists of the following:

- Tab Bar
- Browser View Bar
- Pivot
- Item List



Workspace Display

The Tab Strip allows you to navigate between the different sections of the application, such as documents, summary reports and productions. Clicking on a tab takes you to that section. Depending on your permissions within Relativity, you may see only the documents tab. If not all tabs can be displayed at once click on one of the triangle shaped icons at the end of the tabs to move across the tab list.



Tab Scroll button

The Browser, which may not be available to all users, provides you with the following different ways of navigating your case documents:

- Folders
- Field Tree
- Advanced or saved searches
- Clusters

You may see some or all of these options.

The View Bar controls which documents and fields are displayed in the item list manager.

The Item list Manager is the central location for viewing lists of workspace documents. The Item list Manager allows you to do the following:

- Navigate through workspace documents
- Search and filter workspace data
- Export workspace information to file

- Mass-act on workspace documents
- Sort documents on the list

3.1 Browser

The Browser is located on the left side of the workspace. Depending on the rights you have been granted, you may not see the browser. If you do not have a browser in your workspace, you can skip this section of the Reviewer manual.

If the browser is visible, it will contain up to three options for browsing through your documents:

- Folders
- Field Tree
- Advanced and saved searching
- Clusters

No matter which of these options you use, there are a few display options you can use to customize your workspace.

The browser will be open by default. You can hide or show the browser by clicking the vertical Hide Browser or Show Browser link directly to the right of the browser. Clicking Hide Browser closes the browser and expands the item list manager to the full width of the Relativity window. The filtered selections you have chosen in the browser will be displayed on the vertical bar when the browser is hidden. You may reopen the document browser by clicking the Show Browser link.

The document browser may also be resized. Use the browser resize handle – the thick, black vertical bar to the left of the show/hide browser link – to resize the browser to suit your preference.

3.1.1 Browser Options

The browser menu is located directly below the browser. Click on one of the menu's options to display that mode of the browser:

Browser Menu Display

Icon	Name	Description
	Folder browser	Navigate the folder hierarchy for your workspace
	Field Tree	Browse your documents according to how they were coded
	Saved and advanced search	Create a new search, or browse previously saved searches
	Clusters	Browse your workspace clusters, which are groupings of conceptually correlated documents

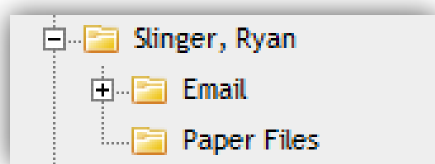
Browser Icons

3.1.1.1 Workspace Folders

Clicking on the folder icon allows you to navigate the folder hierarchy for your workspace. The folder structure is set when documents are imported. It can be based on the document's source, or according to a folder structure set by your Relativity administrator. Clicking on a folder displays that folder's documents in the item list.

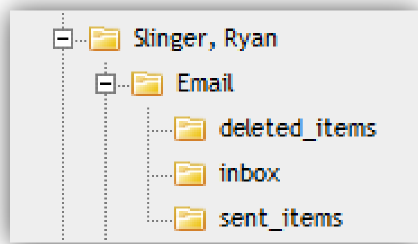
A folder often has multiple subfolders. You can view the subfolders with the expand (+) button to the left of the desired folder. Once the subfolders are expanded, you can use the collapse (-) button to collapse subfolders back into their root folder.

Click **expand (+)** to view to view the subfolders:



Expanding a Folder

Click **collapse (-)** to get back to the root folder:



Collapsing a Subfolder

3.1.1.2 Advanced and Saved Searches

Advanced and Saved Searches combines many of Relativity's searching tools into one feature-rich interface.

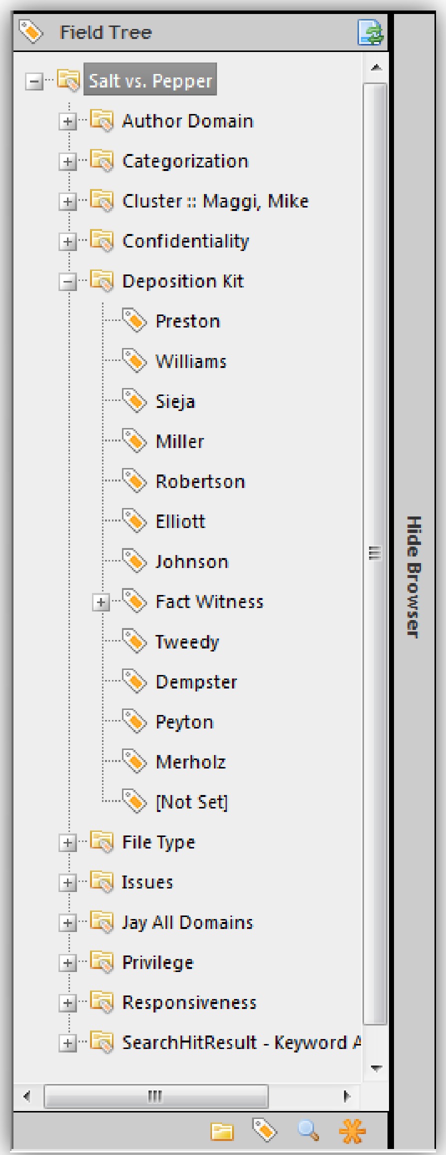
For detailed instructions on creating advanced and saved searches, see the Relativity Searching Guide.

> All Relativity documentation can be found in the reference guides section of the kCura Support site:
>
> www.kcura.com/relativity-manual

3.1.1.3 Field Tree

Clicking on the Field Tree icon displays the Field Tree in the browser. Selected single and multiple-choice list fields and their choices are available in a tree structure.

Below is an example of a Field Tree:



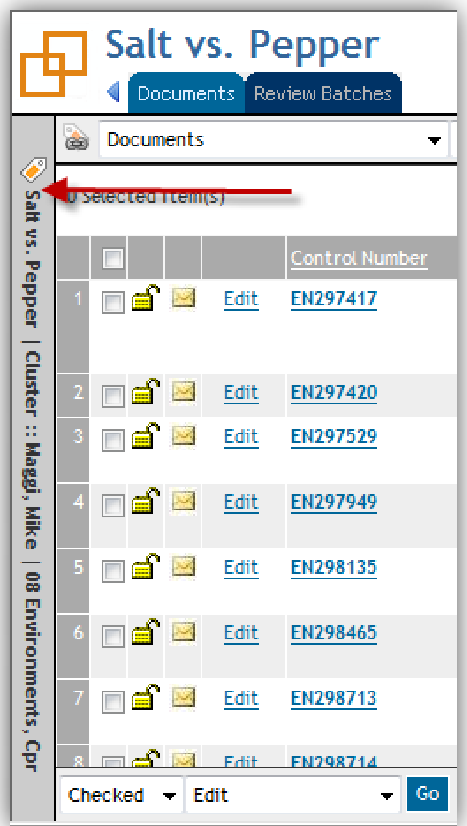
Field Tree Display

Each single and multiple-choice field has its own choice folder in the Field Tree. The field's choices are displayed as subfolders. A [Not Set] choice is also available for each field, which displays null values for the field.

Clicking on a choice within the Field Tree displays all the documents in the item list manager that have the selected choice value AND meet the criteria of the active view.

The current browser location drives what is displayed in the item list. The breadcrumb, pointed to by the red arrow below, shows the current browser selection.

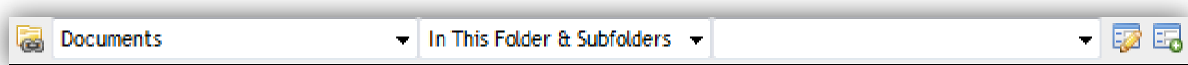
The breadcrumb can also be accessed by clicking on the Show Current File Path  icon.



Breadcrumb Display

3.2 View Bar

You can use the view bar, as well as any searches or filters, to further narrow the document set.



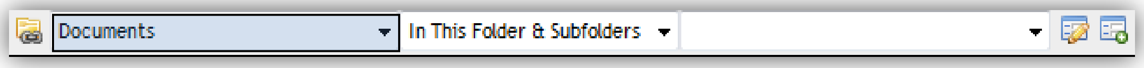
View Bar Display

The view bar consists of the following sections:

- Show current path icon

- Views
- Scope Menu
- Include Related Documents
- Dictionary
- Edit view icon
- Create view icon

3.2.1 Views



View Menu Display

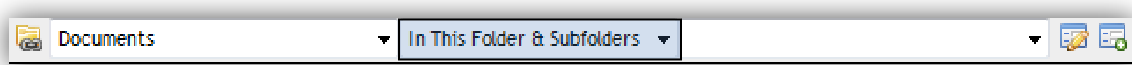
The view menu, highlighted in blue above, controls the following:

- The documents included in the searching set (in addition to the browser selection and any active searches); this is based on a set of criteria, which might include:
  - All documents in a workspace
  - Documents that have been assigned to you
  - Documents that fall within a specified date range
- The fields returned; any field in the workspace can be included
- The default sort order

If you would like to add or edit a view, contact your Relativity administrator.

> Your Relativity administrator can create a personal view for you – a view that is visible only to you and the Relativity administrator.
>
> Contact your Relativity administrator to have a personal view created.

3.2.2 Scope Menu

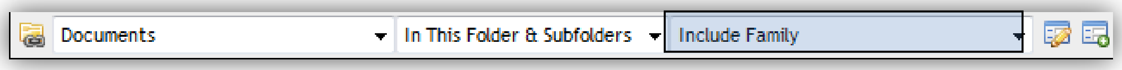


Scope Menu Display

The scope menu, highlighted in blue above, controls the folder scope of the documents returned. The scope menu contains the following options:

- **In This Folder and Subfolders**
  - Displays the documents in the currently selected folder AND the documents in all of its subfolders. This is the default option.
- **In This Folder**
  - Displays ONLY the documents in the currently selected folder in the browser, not its subfolders.

3.2.3 Include Related Documents



Include Related Documents Display

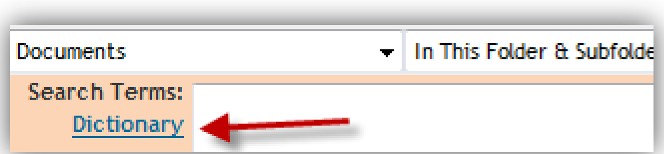
Include Related Documents returns documents related to the documents currently in the view. The options vary by workspace, but may include email family groups, duplicates or near duplicates. Related items are further described in the Related Items Pane section of this document.

3.2.4 Dictionary

When using dtSearch, a Dictionary Search option is available.

The Dictionary Search allows you to search the index for a specific term and see the total occurrences of the term and the number of documents containing it.

To launch the Dictionary Search, click the **Dictionary** link next to the Keywords textbox.

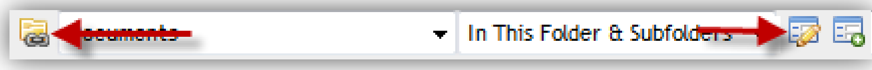


Dictionary Link

For more information, refer to the Relativity Searching Guide.

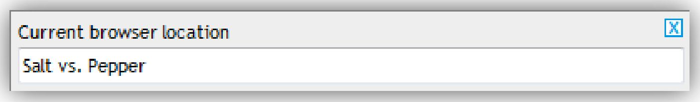
3.2.5 Icons

In the left hand of the view bar there will be one icon and at the right end of the view bar, there may be one or two icons, as seen in below:



Icon Display

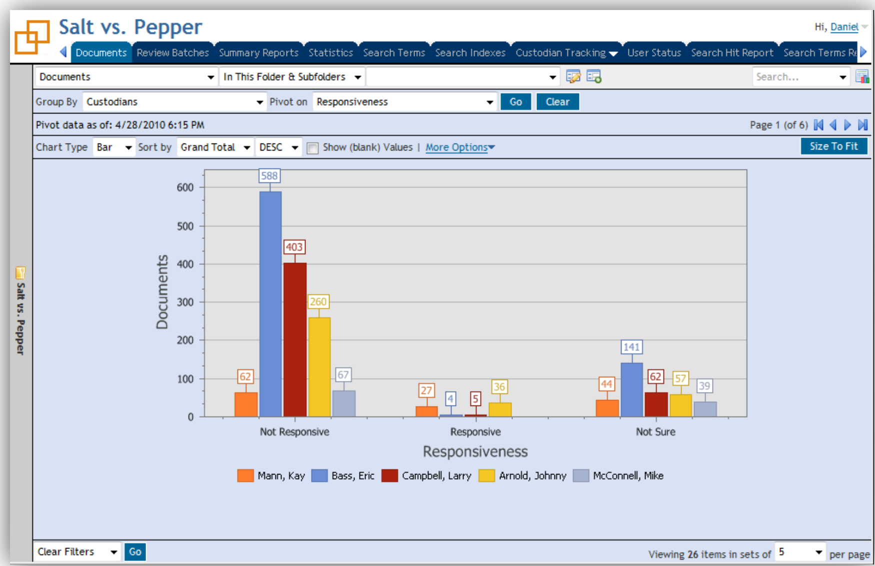
The icons are:

Icon	Description
	Show the current path. This allows you to copy your current browser location to the clipboard paste into various locations. Clicking this brings up the following: 
	Add a new view. This will only be present if you have permission to add a new view. If it is not present, contact your Relativity administrator to add a view.
	Edit the current view. This will only be present if you have permission to edit the view. If it is not present, contact your Relativity administrator to edit the current view.

Once you have used your browser selection and view bar to select the correct searching set of documents, you can begin working with them in the item list manager.

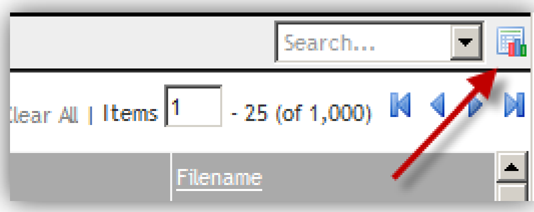
3.3 Pivot

The Pivot function is a data analysis toolset. Pivot allows you to summarize your case data – displaying the results graphically or in a table – to reveal trends and patterns. You can filter and drill into your results to take actions on key data sets at any point during the case lifecycle.



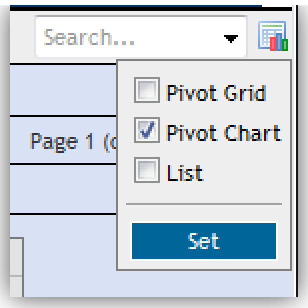
Pivot Chart Display

Pivot has two main components – Pivot Grid and Pivot Chart – and can be launched via the  icon in the top right corner of the item list. This icon is available in the Documents tab and for objects that have been enabled for Pivot. You can Pivot on the results of any view or saved search.



Pivot Icon

Clicking on the Pivot icon will open the Pivot menu.



Pivot Menu

There are three options available:

- **Pivot Grid** turns the pivot grid on/off.
  - Pivot Grid shows your pivot in a table.
- **Pivot Chart** turns the pivot chart on/off.
  - Pivot Chart shows your pivot graphically, as a bar, line, or pie chart.
- **List** turns on/off the document view – what you see when you browse to the documents tab.

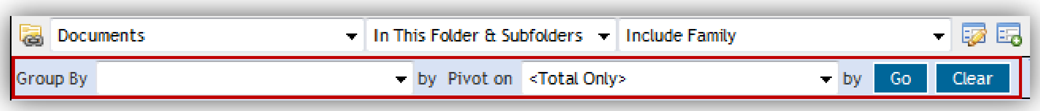
You can use these options in any combination.

3.3.1 Pivot Grid

The Pivot grid offers the ability to create a summary of where two fields' data intersects. Similar to the way you can use a spreadsheet to find totals and create visual representations of data, pivot tables allow you to several options for working with document data.

3.3.1.1 Setting up a Pivot Grid

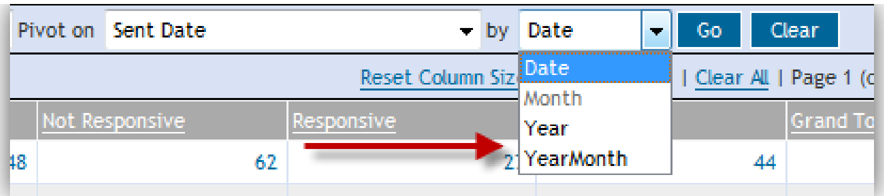
There are two fields that intersect to create the summarized data table or chart.



Pivot Grid Options

- **Group By** creates the list of items to summarize – the vertical axis of the pivot grid.
- **Pivot on** is an optional field that allows you to break down the totals for each "Group by" row by a secondary column. Pivot on acts as the horizontal axis of the report.

If a date field is selected, you can choose how to summarize dates.



Date Drop-down

The options are:

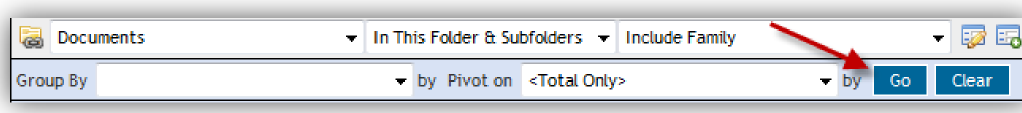
- **Date** will summarize on each unique date.
  - Unless you are working on a subset, this has the possibility to create a "Too complex" pivot.
- **Month** will summarize on each month. Month is only available in "Pivot on" if your "Group By" field is also a date.
- **Year** will summarize on each year
- **YearMonth** will summarize on each Year/Month combo.
  - For example, Jul-09.

> Not all fields will be available to group by or pivot on. Contact your Case Admin to enable this functionality for additional fields.

Fields with many unique values can produce Pivot Grids that are difficult to read. For example, selecting "Email Subject" as the Group By field could result in tens of thousands of rows and would lack value.

3.3.1.2 Running a Pivot Grid

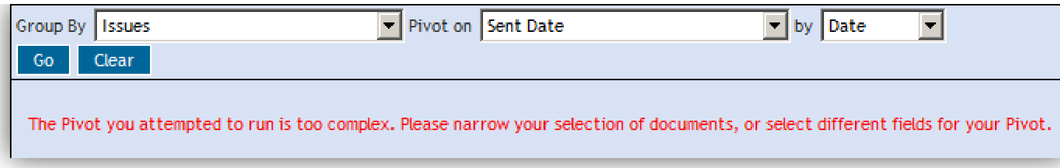
Once you have selected your fields, click **Go**.



Launch a Pivot

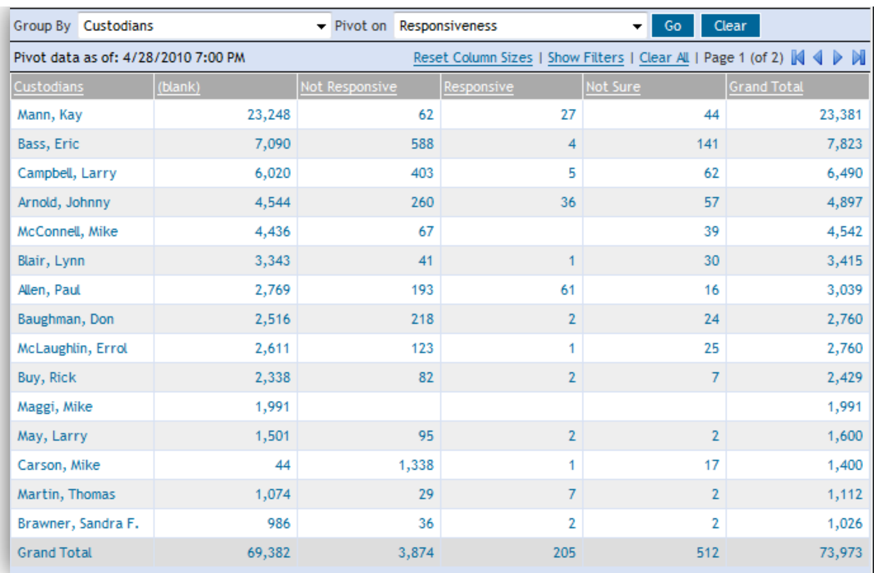
If either of your Group By or Pivot on fields contains too many values, you will get the following message:

- "The Pivot you attempted to run is too complex. Please narrow your selection of documents, or select different fields for your Pivot."



Complex Pivot Message

Once the pivot query is finished executing, the results will populate the Pivot Grid. Below, a simple pivot on the Custodians and Responsiveness fields has been executed:


Group By Custodians | Pivot on Responsiveness | Go | Clear

Pivot data as of: 4/28/2010 7:00 PM | Reset Column Sizes | Show Filters | Clear All | Page 1 (of 2)

Custodians	(blank)	Not Responsive	Responsive	Not Sure	Grand Total
Mann, Kay	23,248	62	27	44	23,381
Bass, Eric	7,090	588	4	141	7,823
Campbell, Larry	6,020	403	5	62	6,490
Arnold, Johnny	4,544	260	36	57	4,897
McConnell, Mike	4,436	67		39	4,542
Blair, Lynn	3,343	41	1	30	3,415
Allen, Paul	2,769	193	61	16	3,039
Baughman, Don	2,516	218	2	24	2,760
McLaughlin, Errol	2,611	123	1	25	2,760
Buy, Rick	2,338	82	2	7	2,429
Maggi, Mike	1,991				1,991
May, Larry	1,501	95	2	2	1,600
Carson, Mike	44	1,338	1	17	1,400
Martin, Thomas	1,074	29	7	2	1,112
Brawner, Sandra F.	986	36	2	2	1,026
Grand Total	69,382	3,874	205	512	73,973

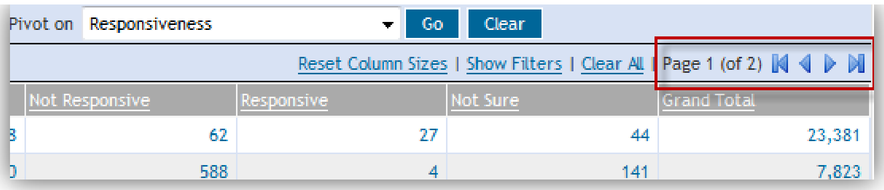
Pivot Grid Results

3.3.1.3 Working With Pivot Grid Results

Once your Pivot Grid has returned results you have several options to work with the results:

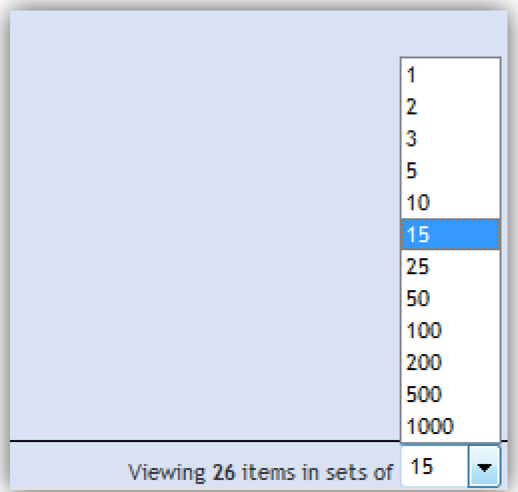
First, you can resize any columns. Left-click and drag a column header border to the desired size.

Second, your Pivot Grid may contain many pages of results. To view all results, you can browse through all pages, or you can expand your page size. If your Pivot Grid has more than one page, it will be indicated in the upper right corner of the Pivot Grid.



Pivot Navigation Arrows

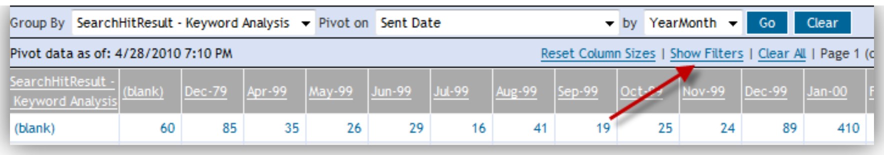
To page through results, use the navigation arrows. You can expand your page size to accommodate all results. The page size is determined by the dropdown in the bottom right of the Pivot Grid.



Item Set Drop-down

By default, results will be sorted with by your Group By field in descending order. You can sort the Pivot Grid, just like you work with the document list. Click on any column header once to sort it descending, and a second time to sort it ascending.

If you find there are too many results in your Pivot Grid, you can filter within the Pivot Grid. Click **Show Filters** above the Pivot Grid to activate the filters.



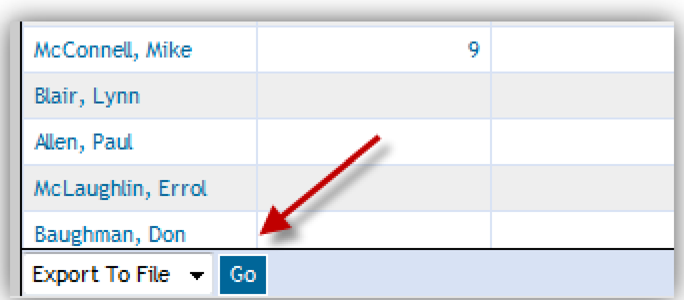
Show Filters Link

Filtering within the Pivot Grid works like filtering in any other part of Relativity. For more information on filtering in Relativity, see the Relativity Searching Manual.

Additionally, you can use the Pivot Grid as a tool to filter a larger data set. For more information, see the “Using Pivot to Filter” section below.

Finally, you can export the Pivot Grid to file. In the bottom left of the Pivot Grid, select **Export to File** from the dropdown, then click **Go**.

> The Export to File option in Pivot exports in HTML format to avoid issues with CSV delimiters in Excel.



Export To File

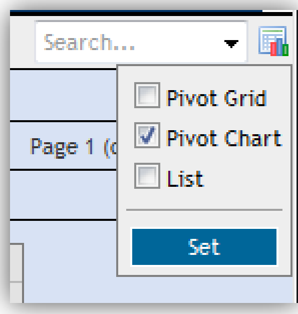
3.3.2 Pivot Chart

In addition to showing pivot results in the Pivot Grid table, you can also show the results graphically using the Pivot Chart.

3.3.3 Setting up a Pivot Chart

A Pivot Chart is set up the same way as a Pivot Grid. Please see the “Setting up a Pivot Grid” section for details on field selection and considerations.

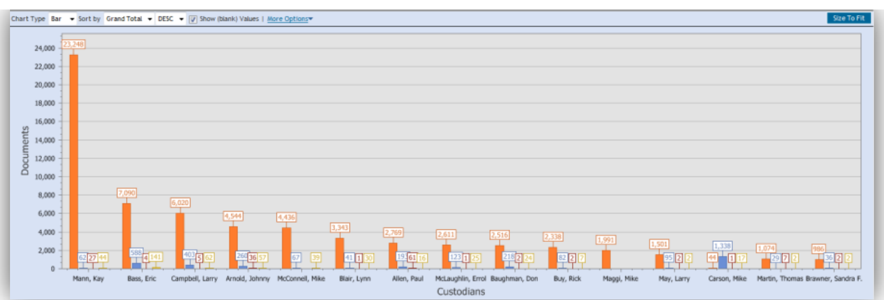
If you already have a Pivot Grid run, you can easily switch to or add a Pivot Chart by activating the component:



Pivot Chart Enabled

Add the Pivot Chart check box and click **Set** to launch the Pivot Chart.

The pivot chart reflects the results of the query executed in the Pivot grid above.



Pivot Chart Display

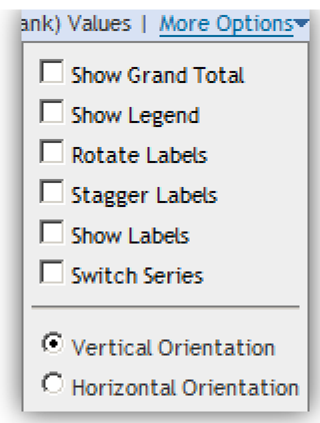
3.3.4 Working With Pivot Chart Results

Pivot Charts allow many customization options to optimize their look and feel. The options are displayed in the tool bar at the top of the pivot chart:

Pivot Chart Tool Bar

- **Chart Type** allows you to choose the chart type:
  - **Bar** -displays rectangular bars with lengths proportional to the value that they represent. The value will be shown above the bar.

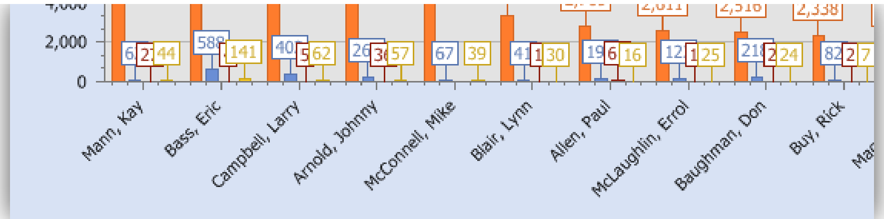
    - **Pie** – displays a circular chart (pie chart) divided into sections to illustrate each value within the pie. The value and percentage will be shown for each section.
    - **Line** –compares two values plotted along an axis; the vertical and horizontal. The value is shown where the two axis meet.
- **Sort by** allows you to select how you want the chart information to be sorted by:
    - Grand Total
    - Your selected "Group By" field
- **ASC/DESC** is a drop-down that allows you to choose between the ASC and DESC settings:
    - **ASC** will display the field information in ascending in order in both the chart and the grid.
    - **DESC** will display the field information in descending order in both the chart and the grid.
- **Show (blank) Values** is a checkbox that allows you to show or hide totals in the Pivot Chart. Blanks counts may be high, so hiding them may improve the readability of the chart.
- **More Options** is a link that, when selected, shows the following drop-down:



More Chart Options

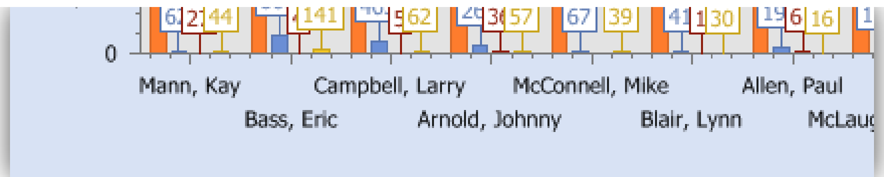
- The options in this drop-down are:
    - **Show Grand Total** toggles the display of grand total in the Pivot Chart. This value can help add context, but may throw off the scale of the Pivot Chart and reduce readability.
    - **Show Legend** toggles the display of the Pivot Chart legend. This information can often be intuited from looking at the chart. If not, it can be added.

- **Rotate Labels** rotates the group by labels at a 45 degree angle. This can help readability in fields with many values.



Rotate Labels Option

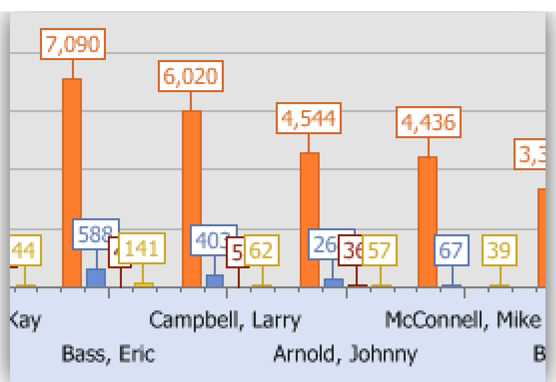
- **Stagger Labels** is another option to improve readability of group by values. Stagger labels varies the horizontal position of the labels to improve readability



Stagger Labels Option

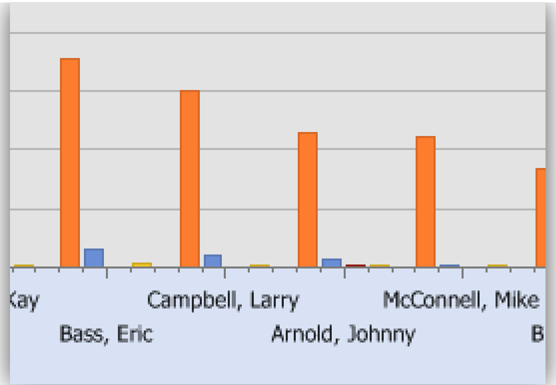
- **Show Labels** toggles the value count labels on Pivot Charts:

Labels shown:



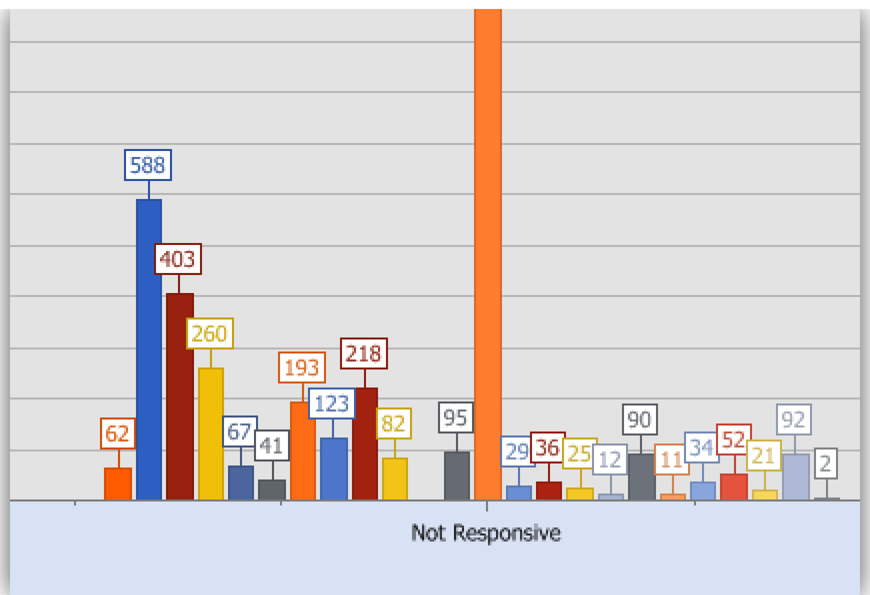
Show Labels Option

Labels hidden:



Show Labels Unchecked

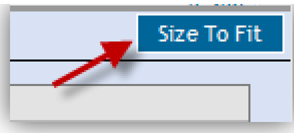
- **Switch Series** switches the Group by and Pivot field's positions. In the above examples, our Group By field – Custodian, was the value on the horizontal axis, while our Pivot on field – Responsiveness, drove the bars on the chart. Selecting Switch Series would put Responsiveness on the horizontal axis, and chart bars for each Custodian.



Switch Series Option

- There is also a radio button list that allows you to change the axes of the report between :
  - **Vertical**
  - **Horizontal**

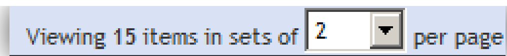
In the upper right corner of the pivot chart is the **Size To Fit** button.



Size To Fit Button

Clicking the **Size to Fit** button expands the Pivot Chart to the maximum size allowed in the current window.

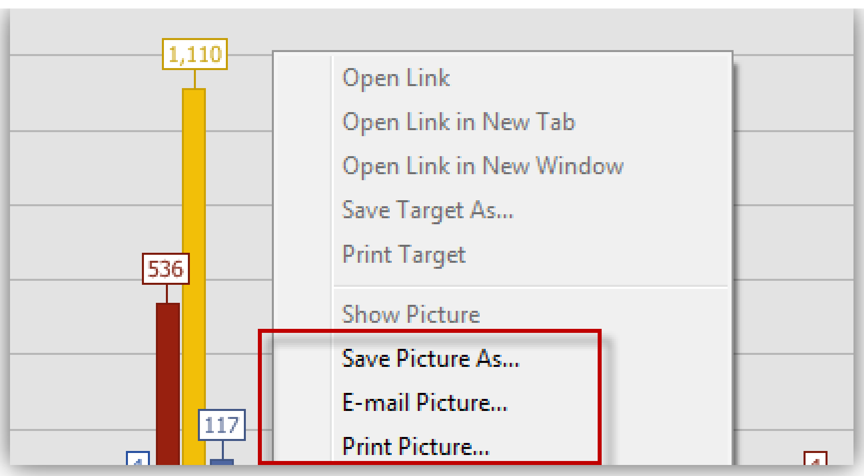
In the bottom right corner of the chart window is the items per page drop-down.



Items Per Page

This dropdown allows you expand the number of items listed on the chart. While adding more items can give the chart more scope, adding hundreds of items can make the chart illegible.

Finally, you can use right click functionality to use the chart outside of Relativity. Right-clicking will allow you the following options:



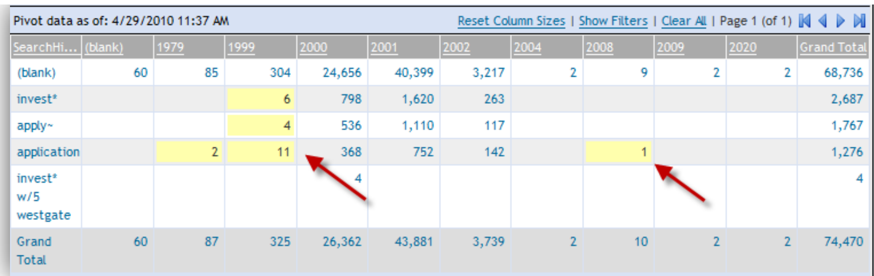
Right-Click Options

3.3.5 Using Pivot to Filter your Document List

You can use the Pivot Grid or Pivot Chart to filter the document set.

3.3.5.1 Filtering the Document List with Pivot Grid

In the Pivot Grid, click a cell once to add it to your filter list. This adds the item to the filter list, but does NOT execute the filter. Selected cells will be shown in yellow. You can continue to add multiple selections to the filter list.



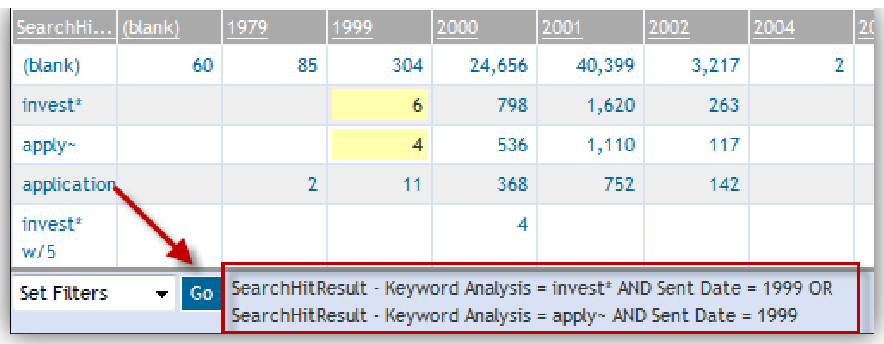
Pivot data as of: 4/29/2010 11:37 AM Reset Column Sizes | Show Filters | Clear All | Page 1 (of 1)

SearchHi...	(blank)	1979	1999	2000	2001	2002	2004	2008	2009	2020	Grand Total
(blank)	60	85	304	24,656	40,399	3,217	2	9	2	2	68,736
invest*			6	798	1,620	263					2,687
apply~			4	536	1,110	117					1,767
application		2	11	368	752	142		1			1,276
invest* w/5 westgate				4							4
Grand Total	60	87	325	26,362	43,881	3,739	2	10	2	2	74,470

Cells Added to Filter List

Clicking on a selected cell a second time will de-select the filter.

Selected filters will be noted in the bar below the pivot. When you have selected the desired filter conditions, ensure that “Set Filters” is applied in the dropdown, and click **Go**.



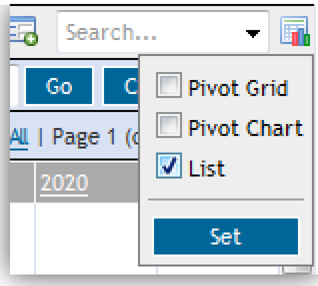
SearchHi...	(blank)	1979	1999	2000	2001	2002	2004	20
(blank)	60	85	304	24,656	40,399	3,217	2	
invest*			6	798	1,620	263		
apply~			4	536	1,110	117		
application		2	11	368	752	142		
invest* w/5				4				

Set Filters Go SearchHitResult - Keyword Analysis = invest* AND Sent Date = 1999 OR SearchHitResult - Keyword Analysis = apply~ AND Sent Date = 1999

Selected Filters Bar

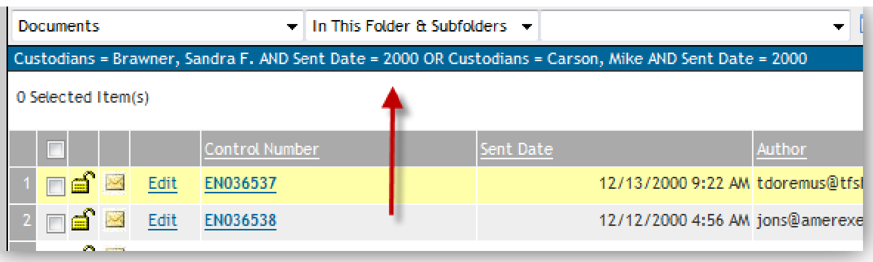
The document list will be filtered. If the document list was hidden while you worked with the Pivot Grid, it will be shown.

If you would like to work strictly with the document list after the filter has been applied, you can hide the Pivot Grid by deselecting its option.



Item List Enabled

Hiding the Pivot Grid will result in a filter bar appearing above the item list, showing the active filters.

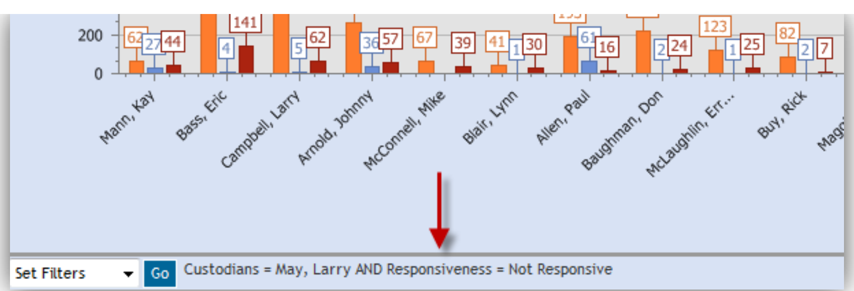


Active Filters Bar

3.3.5.2 Filtering the Document List with Pivot Chart

Using the Pivot Chart to filter the document list works much like filtering from the Pivot Grid.

To filter in the Pivot Chart, click on the desired bar, line plot, or pie chart slice. Although there is no change to the chart, the filter selection will show below the chart. Click Go to apply the filters to the document list.

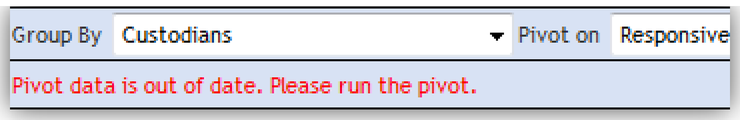


Document List Filter Bar

3.3.6 “Pivot Data is out of Date”

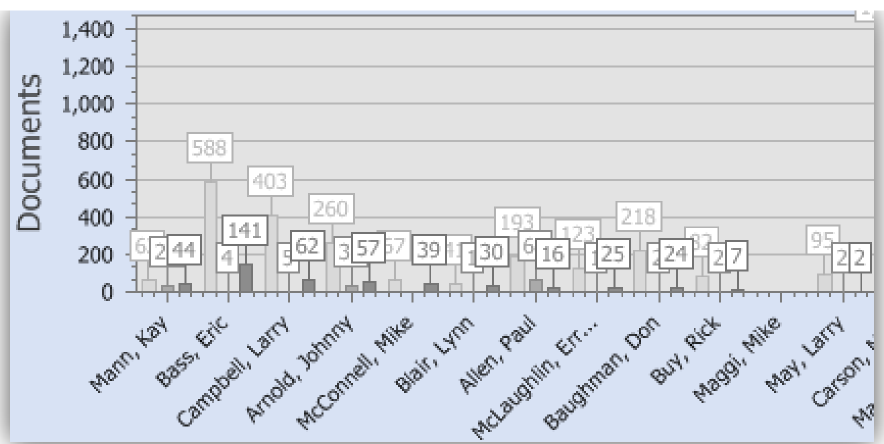
Pivot Grids or Charts will not automatically refresh if you change your data source. This is done when you move to a new folder, move to a new choice, apply a filter, or a search.

If you change the data source, you will see a message above the pivot: “Pivot data is out of date. Please run the pivot.”



Out of Date Message

Additionally, the Pivot Grid and Pivot Chart will be greyed out to indicate that the data no longer applies to the current document set.



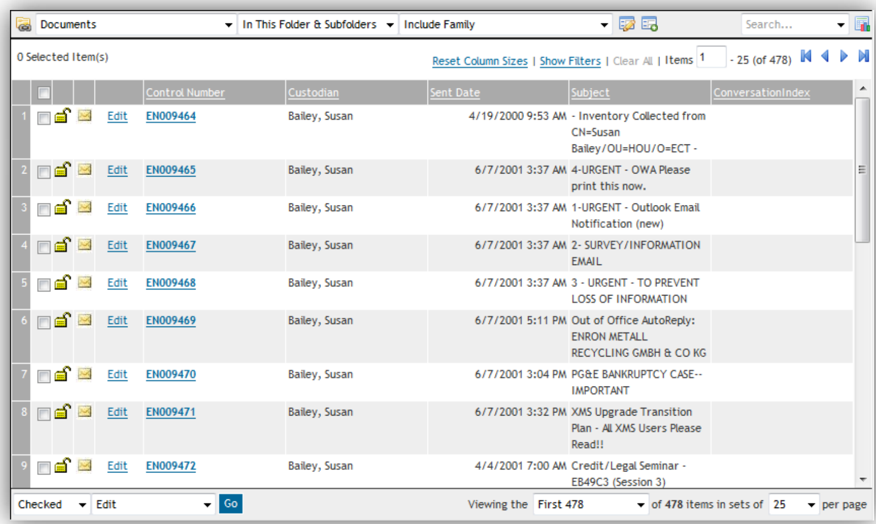
Non-applicable Data

If you see this message, click go to re-run the Pivot with the new data set.

3.4 Item list Manager

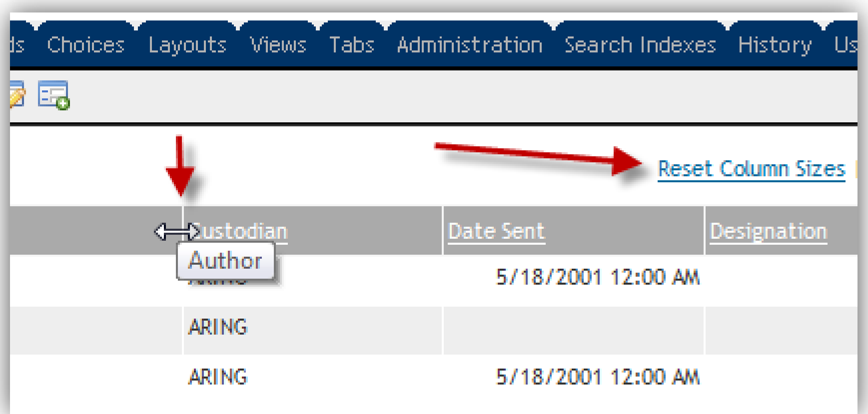
The item list manager consists of the item list, as well as controls for working with the documents. The fields displayed in the item list are based on the selected view, which is editable.

Contact your Relativity administrator to change the fields in your view.



Item list Manager

To change a column size, hover over the white bar at the edge of the column header and drag it either direction to widen or narrow the column. A double arrow will appear when it is ready to be moved. The other columns on the page will automatically adjust to fill the rest of the window. Column data can be cut off. If you wish to return to the initial settings click on the blue link at the top of the Item list to **Reset Column Sizes**.



Column Resizing

3.4.1 Previewing a Document

Note that if you hover your mouse pointer over a record's file icon, you can left-click to open a pop-up viewer showing the record.

If your item list doesn't contain the file icon, contact your Relativity administrator to add it.

3.4.2 Sorting

You can use any present field to sort the entire searching set – the number of documents indicated in the bottom right.

Click any field heading once to sort the documents in that field in ascending order, alphabetically. A down arrow will appear next to the heading name, as in the Reviewer field below.

		Name	Control Number	Reviewer ⇩
☐	Edit	2005.09.06 - EDDS Screen Shots.ppt	FS00002571	Brian
☐	Edit	feature comparison relativity.xls	FS00002572	Brian
☐	Edit	2006.07.13 - Relativity Vision.doc	FS00002573	Fiona
☐	Edit	10.11.05.ppt	FS00002574	Keith

Sorting Down Arrow

Click a second time to sort the documents in descending order, alphabetically. An up arrow will appear.

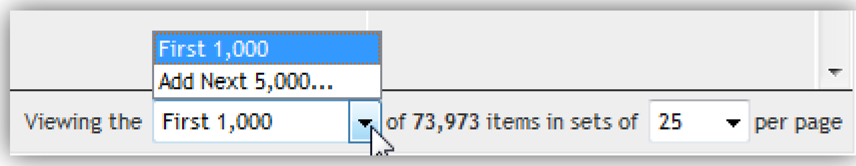
		Name	Control Number	Reviewer ⇧
☐	Edit	10.11.05.ppt	FS00002574	Keith
☐	Edit	2006.07.13 - Relativity Vision.doc	FS00002573	Fiona
☐	Edit	feature comparison relativity.xls	FS00002572	Brian
☐	Edit	2005.09.06 - EDDS Screen Shots.ppt	FS00002571	Brian

Sorting Up Arrow

If you are unable to sort a particular field you should contact your Administrator and make sure the field has the Sort option set to Yes.

3.5 Document Set Information Bar

The document set information bar is found in the bottom right corner of the workspace. It consists of the returned set selector and the displayed set selector. The document set information bar gives you further control over how you work with your searching set.



Document Set Display

The returned set selector indicates what subset of your searching set Relativity returns. Your returned set is controlled by the dropdown seen in the above screenshot.

> The size of your returned set DOES NOT control which items you can search, or on which items you can run a mass operation. Any search you run is based on the number of documents in your searching set.
>
> Any mass operation you run can be based on the number of checked items in the item list, the number of returned items, OR all the items in your searching set. Mass operations are further detailed later in this document.

Depending on your environment, the default returned set size may be 500 or 1,000. If you'd like to change your environment's results set selector defaults, contact your Relativity administrator.

Note that the number of documents in your result set selector is the number of documents you will be able to browse in the core reviewer interface.

For instance, if your result set selector is set to 500 documents, you will be able to browse the first 500 documents of your searchable set. You will not be able to browse to document 501 in the viewer.

However, you do have two courses of action:

- Adding more documents
- Applying filters to bring back only the documents you'd like to browse.

3.5.1 Adding More Documents

Click on the dropdown and add documents to the returned set. Depending on your environment, you may be able to add an additional 500, 1,000 or 5,000 document to your returned set. If you'd like to change your environment's results set selector defaults, contact your Relativity administrator.

3.5.2 Applying Filters

You may find it beneficial to use searching or filtering to narrow your searchable set, allowing you to browse through the key documents in the viewer.

For example, let's say your workspace is 120,000 records, and you'd like to see documents in the middle of the workspace – EN045340 through EN045960. To get to those documents, click on **Show Filters** in the navigation bar, enter EN045340 BETWEEN EN045960 in the identifier field, and click **Enter.** The hits become your searching set, allowing you to browse the documents.

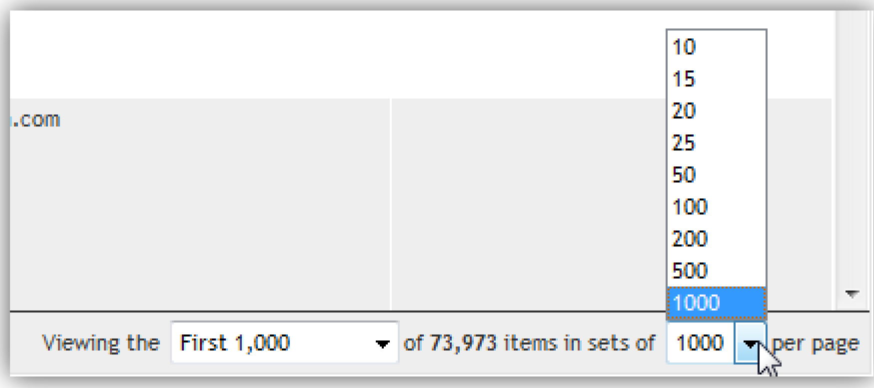
Similarly, if you are looking for documents after a specific date – say December 5, 1998 – you could filter the correct date field with the term >=12/5/98.

These are just two examples. For more information on searching techniques, please see the Relativity Searching Guide.

All Relativity documentation can be found in the reference guides section of the kCura Support site:

www.kcura.com/relativity-manual

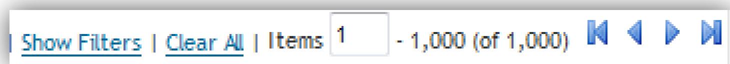
The displayed set selector expanded below, sets the number of documents shown in the item list at one time. The option you select remains in force throughout this session, or until you select another option



Set Selector

3.6 Navigation Bar

Based on the selections in your document set information bar, you can navigate the item lists using the navigation bar. The navigation bar is located in the upper-right corner of the item list manager.



Navigation Bar

The Show Filters option allows you to apply a filter on any field in the item list. Filters can help you narrow the item list to focus on key records. For information on how to use filters effectively, see the Relativity Searching Guide.

All Relativity documentation can be found in the reference guides section of the kCura Support site:

www.kcura.com/relativity-manual

Your browsing options are set by your selections in the set information bar. Below, the displayed set is 1000 documents, and the returned set is 25 documents. Therefore, you are able to browse through those 1,000 documents in 25 document sets.

Displayed Set/Returned Set

To jump to a specific document, you can enter a record number into the textbox shown above and hit enter. You can also use the navigation arrow links.

Navigation Arrows

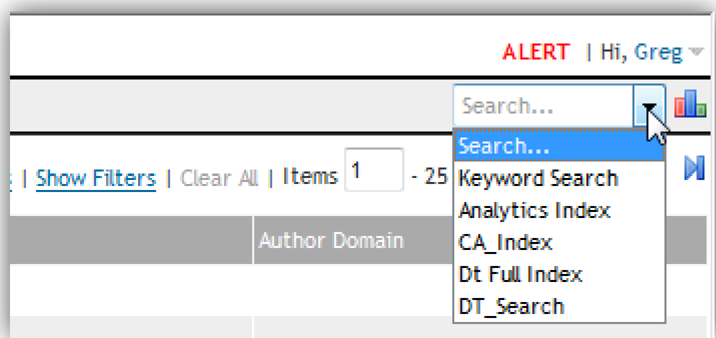
The navigation arrows do the following:

			
Top of first page	Previous page	Next page	Last page

If you would like to browse the documents in the core reviewer interface, click on a control number to launch that document. Remember, you will be able to browse only the selected returned set. However, you can always add more documents if you need to.

3.7 Searching

You can run a keyword search on your entire searching set by selecting an index from the Search drop-down in the upper-right corner of the item list manager. The Search With dropdown is shown in red below.



Search With Dropdown

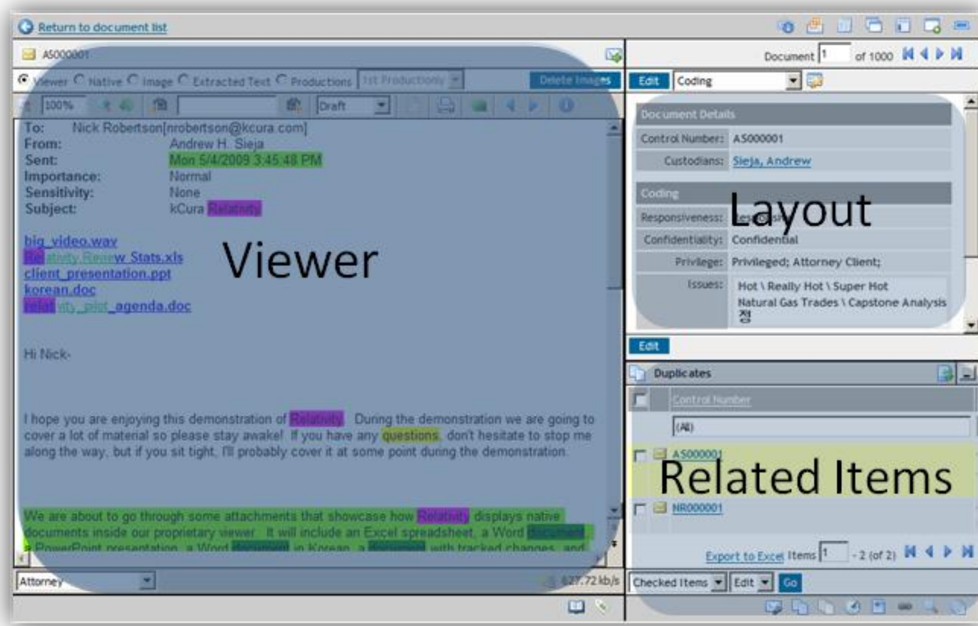
The options in your dropdown vary with each workspace. Descriptions of the different search indexes, as well as details on how to use them, can be found in the Relativity Searching Guide.

All Relativity documentation can be found in the reference guides section of the kCura Support site:

www.kcura.com/relativity-manual

4 Core Reviewer Interface

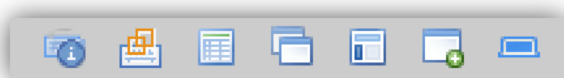
By clicking on a document's control number, you open the document in the core reviewer interface.



Core Reviewer Interface

The core reviewer interface screen consists of three panes: the viewer, layouts, and the related items pane.

Several viewing options can be toggled using the icons in the upper-right-hand corner of the window.



Viewing Option Icons

Icon	Description
	Displays the Keyboard Shortcuts legend, which contains keyboard shortcuts, actions, viewer modes, and categories.
	Enables you to use Keyboard Shortcuts during document review; refer to the legend for a list of shortcuts and their actions.
	Shows and hides the item list of the records you are currently browsing.
	Docks or undocks the **document viewer**. When undocked, the **document viewer** opens in a separate pop-up window to facilitate a multi-monitor review. As you browse records, the undocked viewer will show the active record.
	Swaps the position of the **document viewer**. The document viewer moves from the left side of the screen to the right.
	Pops out a standalone viewer of the current record. Unlike the toggle listed above, this is a static pop-up, and it will not update as you browse through records.
	Hides and un-hides the tab strip within the core reviewer interface for easy navigation to different objects.

4.1 Keyboard Shortcuts

Clicking the () icon displays the Keyboard Shortcuts legend, which includes the following sortable columns:

- **Keyboard Shortcut** is the key-combination used to execute the shortcut during document review.
- **Action** is the action that results from using the keyboard shortcut.
- **Viewer Mode** lists the viewer mode for which each shortcut is available. Note that most of the System category shortcuts can be used in all viewer modes.
- **Category** lists the shortcut type. Below, the legend displays only those shortcuts designated by the System and Internet Explorer. This column will also list all Field and Choice shortcuts configured by your administrator via Field and Choice properties.
- Note the following Keyboard Shortcut Tips listed above the legend:
    - Shortcuts only execute in the Core Reviewer Interface.

- Shortcuts only execute in the Viewer Modes listed in the legend.
- If the document viewer is undocked, shortcuts that move the cursor focus to a textbox will only execute if Internet Explorer has a single tab open.

Keyboard Shortcuts Legend

Keyboard Shortcuts Tips:
- Shortcuts will only execute in the Core Reviewer Interface.
- Shortcuts will only execute in the Viewer Modes listed in the legend below.
- If the document viewer is undocked, shortcuts that move the cursor focus to a textbox will only execute if Internet Explorer has a single tab open.

Close Window

Reset Column Sizes | Export to Excel | Show Filters | Clear All |

Keyboard Shortcut	Action	Viewer Mode	Category
Alt+Down Arrow	Next Annotation	Extracted Text, Viewer	System
Alt+E	Switch to Extracted Text Mode	All	System
Alt+End	Last Document	All	System
Alt+Enter	Save and Next	All	System
Alt+Home	First Document	All	System
Alt+I	Switch to Image Mode	All	System
Alt+Left Arrow	Page Up/Previous Image	All	System
Alt+M	Toggle Modes (Draft/Normal/Preview)	Extracted Text, Viewer	System
Alt+N	Switch to Native Mode	All	System
Alt+P	Switch to Productions Mode	All	System
Alt+Page Down	Next Document	All	System
Alt+Page Up	Previous Document	All	System
Alt+Right Arrow	Page Down/Next Image	All	System
Alt+S	Save	All	System
Alt+Space	Edit	All	System
Alt+Up Arrow	Previous Annotation	Extracted Text, Viewer	System
Alt+V	Switch to Viewer Mode	All	System
Alt+Z	Cancel	All	System
Ctrl+A	Select All	All	Internet Explorer
Ctrl+C	Copy	All	Internet Explorer
Ctrl+F	Find	All	Internet Explorer
Ctrl+P	Print	All	Internet Explorer
Ctrl+Shift+T	Reopen Last Tab	All	Internet Explorer
Ctrl+T	New Tab	All	Internet Explorer
Ctrl+V	Paste	All	Internet Explorer
Ctrl+X	Cut	All	Internet Explorer

Keyboard Shortcuts Legend

Keyboard Shortcuts are only available for Relativity Viewer 6.6 and higher. If your Viewer does not automatically upgrade, you must re-install the 6.6 Viewer; otherwise the keyboard shortcut icons will not be visible in the Core Reviewer Interface.

To check your current version of the Viewer, click the ( ) icon in the Core Reviewer Interface.

4.1.1 Special Considerations

Please keep in mind the following when working with Relativity's keyboard shortcuts feature:

- Keyboard shortcuts are active when:
    - Keyboard shortcuts are enabled
    - Focus is in the Core Reviewer Interface
    - The viewer is docked or Undocked and IE only has one tab open
    - If the shortcut overlaps with a Windows shortcut, both shortcuts will be triggered; for example, if a program installed on a user's computer uses the CTRL-ALT-R shortcut, clicking CTRL-ALT-R will trigger that action regardless of whether a user is in Internet Explorer or not
- Keyboard shortcuts are not triggered when:
    - Keyboard shortcuts are disabled
    - Focus is NOT in the Core Reviewer Interface
    - The "mini-viewer" is launched
    - The viewer is undocked and IE has more than one tab open
    - Viewing a document in NATIVE mode

The following table outlines what Document Field types users can define shortcuts for and what behavior the shortcuts trigger:

Field Type	**Can define shortcut?**	**Layout Display Type**	**Behavior**
Fixed Length Text	Yes	Text	Focus jumps to textbox
Long Text	Yes	Text Only	Focus jumps to textbox
		Rich Text	NO ACTION
Date	Yes	Date	Focus jumps to textbox
Whole Number	Yes	Integer	Focus jumps to textbox
Decimal	Yes	Decimal	Focus jumps to textbox
Currency	Yes	Currency	Focus jumps to textbox
User	Yes	Dropdown	Dropdown choices are toggled

		Picker	NO ACTION
Boolean	Yes	Checkbox	Checkbox state is toggled
		Dropdown	Dropdown choices are toggled
Single Choice	No		
Multiple Choice	No		
Single Object	No		
Multiple Object	No		
File	No		

The following table outlines what Document Choices users can define shortcuts for and what behavior the shortcuts will trigger:

Choice Type	Can define shortcut?	Layout Display Type	Behavior
Choice associated with Document **Single** Choice Field	Yes	Radio button	Choice is selected/deselected
		Dropdown	Choice is selected/deselected
Choice associated with Document **Multiple** Choice Field	Yes	Checkbox	Choice is selected/deselected
		Popup Picker	NO ACTION

- The following are keyboard shortcuts for system actions:
    - **Alt + Down Arrow –** Next Annotation
    - **Alt + E –** Switch to Extracted Text
    - **Alt + End –** Last Document

        - **Alt + Enter –** Save and Next
        - **Alt + Home –** First Document
        - **Alt + I –** Switch to Image Mode
        - **Alt + Left Arrow –** Page Up/Previous Image
        - **Alt + M –** Toggle Modes (Draft, Normal, Preview)
        - **Alt + N –** Switch to Native Mode
        - **Alt + P –** Switch to Productions Mode
        - **Alt + Page Down –** Next Document
        - **Alt + Page Up –** Previous Document
        - **Alt + Right Arrow –** Page Down/Next Image
        - **Alt + S -** Save
        - **Alt + Space –** Edit
        - **Alt + Up Arrow –** Previous Annotation
        - **Alt + V –** Switch to Viewer Mode
        - **Alt + Z –** Cancel
    - These key combinations are NOT available for user-defined shortcuts:
        - System Keyboard Shortcuts
        - The following IE shortcuts:
            - **Ctrl + A -** Select All
            - **Ctrl + C –** Copy
            - **Ctrl + F –** Find
            - **Ctrl + P –** Print
            - **Ctrl + Shift -** Reopen Last Tab
            - **Ctrl + T -** New Tab
            - **Ctrl + V –** Paste
            - **Ctrl + X -** Cut

4.2 Document Viewer

The document viewer displays workspace documents. The document viewer menu displays the loaded forms of the documents and controls which form of the document is displayed in the viewer.

The options are:

Document Viewer Options

The document viewer options do the following:

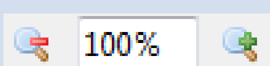
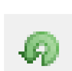
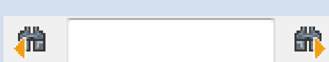
Name	Description

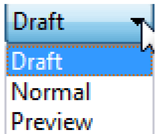
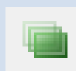
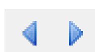
Viewer	Displays the document using the Relativity native file viewer. This is a “quick print” version, showing how the file would look in its native application. This view allows highlighting and redacting. This option will be present only if a native document has been loaded.
Native	Opens document from its native application in the browser, if the native application is installed. This option will be present only if a native document has been loaded. Depending on your permissions, you may not see this option.
Image	Displays a TIFF or JPG version of the document. This view allows redactions and annotations. This option will be present only if an image has been loaded or created.
Extracted text	Displays text that has been extracted. Present only if extracted text is loaded.
Productions	Contains all instances in which the document has been produced. The production state has been saved, so you easily can view the guidelines of how the document was produced. Present only if the document has been included in a production.

Viewer Option Descriptions

If you don’t see a form of the document present in the menu, the form has not been loaded for the workspace, or you don’t have permissions to see it. The viewer and extracted text options have the same toolbar.

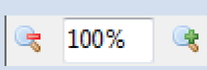
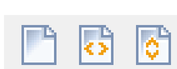
Below is an explanation of each feature in the toolbar:

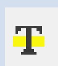
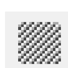
Icon	Name	Description
	**Zoom**	Allows you to zoom in and out of the current document with a 10%-300% limit
	**Reset**	Resets previous function
	**Find previous & next**	Searches for terms in document and navigates through the hits

Icon	Name	Description
	**Draft/normal/preview**	Dropdown for different view modes
	**Fit to window width**	Available only in the preview mode
	**Print current document**	Prints the current document
	**Hide annotations**	Shows/hides all annotations or highlights in the document NOTE: This does not delete the annotations
	**Go to next or previous highlighted term**	Moves through previous highlighted terms in the document
	**About native viewer and Bandwidth Tester**	Displays the version of Relativity Web Client and Outside In Version.

Viewer/Extracted Text Toolbar Features

Because the image viewer has different functionality, it has a different toolbar.

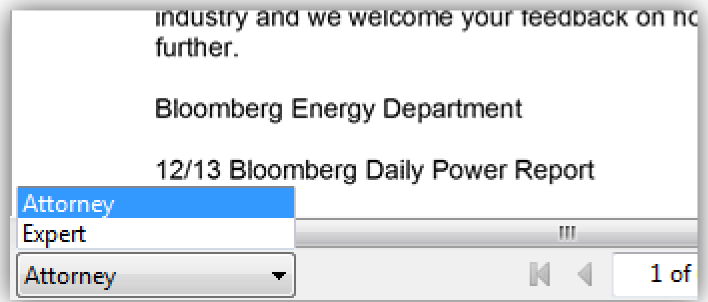
Icon	Name	Description
	**Zoom**	Allows you to zoom in and out of current document with a 10%-300% limit
	**Fit options**	Fit actual (resize to 100%); Fit width (resize to the width of the page); Fit page (resize to the height of the page)
	**Rotate all document pages clockwise**	Rotates all pages in a document clockwise 90 degrees

Icon	Name	Description
	**Rotate current page clockwise**	Rotates the current page clockwise 90 degrees
	**Print**	Prints the current document
	**Switch to normal mode**	Allows users to select within a document
	**Highlight**	Highlights selected text
	**Redact**	Stamp redaction
	**Redact with text**	Text redaction; message can be customized by right-clicking on textbox after redaction is drawn
	**Change markup visibility**	Changes the visibility mode of the annotations between full visibility, transparent and hidden NOTE: Hidden annotations are not deleted
	**About image viewer**	Displays the version of Relativity Web Client installed; if the version is out of date, the symbol will be red

4.2.1 Markup Sets

Depending on your permissions, you may see a dropdown in the lower-left corner of the viewer. The dropdown shows your available markup sets. Markup sets are securable sets of annotations and highlights.

Annotations in Relativity are simply highlights.



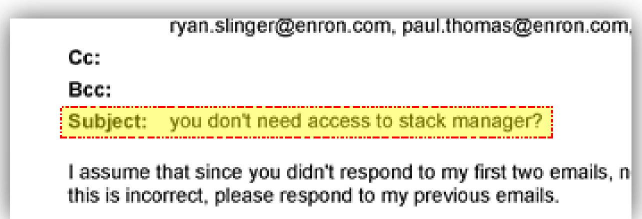
Markup Set Dropdown

If you have more than one markup set, check with your Relativity administrator to learn when to use each markup set.

4.2.2 Annotating & Redacting within the Image

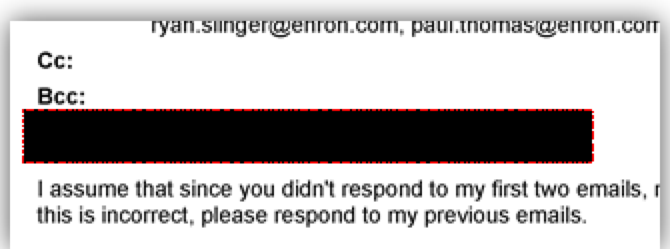
You can use the image viewer's annotation and redaction tools to mark up a document. Select the function you would like to use – highlight, black-box stamp redaction, or text redaction.

- **Highlight**, also known as an annotation in Relativity, creates a transparent yellow box where specified, just like using a highlighter.



Highlight

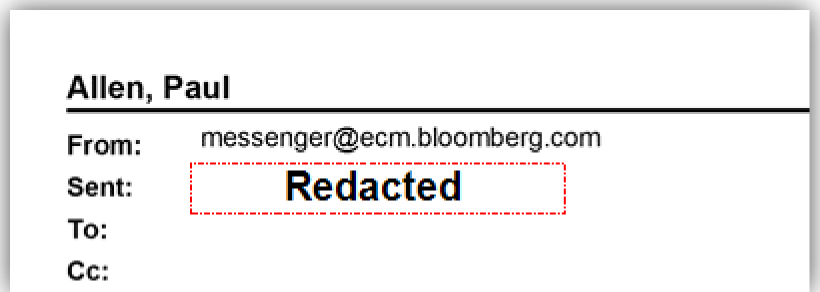
- **Stamp Redaction** creates a solid black box where specified, like using a black marker.



Stamp Redaction

- **Text Redaction**s are white redaction boxes with black text. You can right-click on a text redaction box to apply different text to the redaction box. The text options are set by your Relativity administrator.

You can also right-click and select **Edit**. Using the edit feature, you can apply any term you wish.

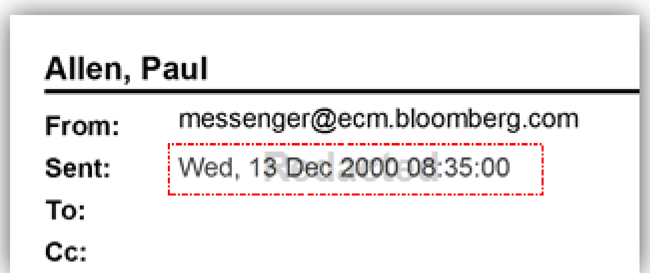


Text Redaction

To delete any annotation, right-click on the annotation and select **Delete**. You can also toggle the annotation and redaction visibility. Click the **Change Markup Visibility** button to change the setting.

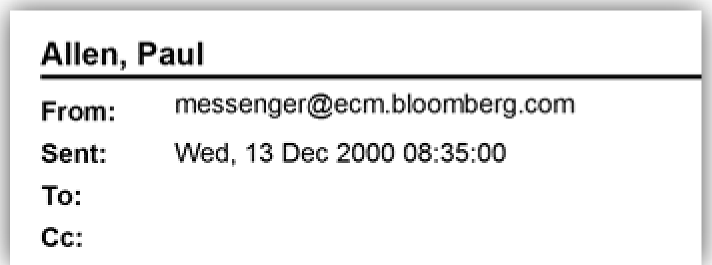
Change markup Visibility Button

Clicking the Change Markup Visibility button once sets the markups to transparent.



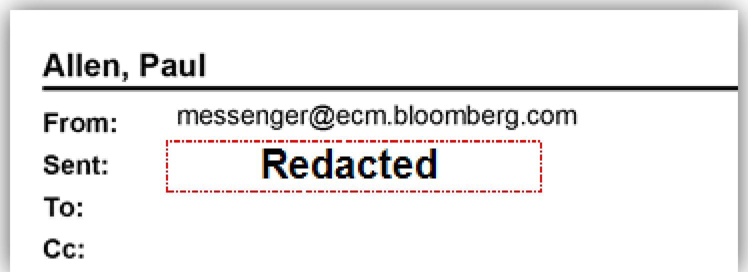
Transparent Markup

Clicking the Change Markup Visibility button a second time sets the markups to invisible. The redactions have not been deleted. They are temporarily hidden.



Invisible Markups

Clicking the Change Markup Visibility button a third time will return the markups to full visibility.



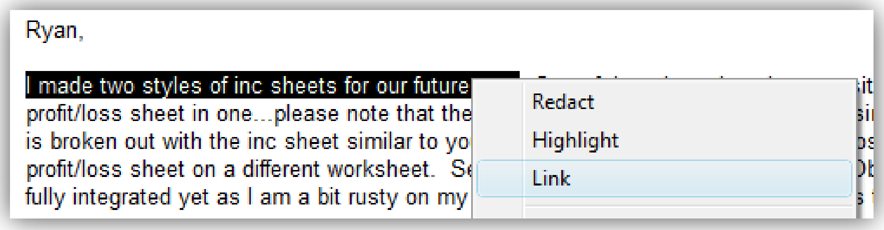
Markup Full Visibility

4.2.3 Creating Links on the Viewer

You can select a section of text in the viewer and link it to another document.

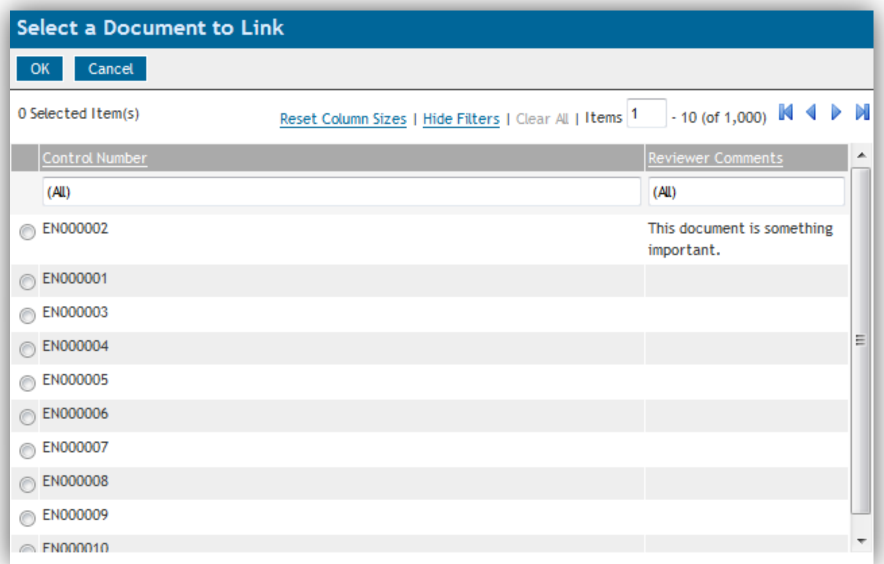
> You can add a link in viewer mode only.

To create a link, select a section of text in the viewer, right-click and select **Link.**



Create a Link

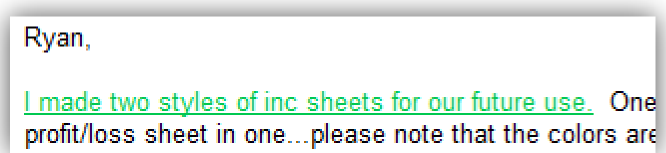
Selecting Link on the right-click produces a pop-up, allowing you to select the document to which you'd like to link.



Document to Link List

Select the document to which you'd like to link from the list. Note that you can filter the list, so if you know the control number – or even the prefix – you quickly can find the desired document.

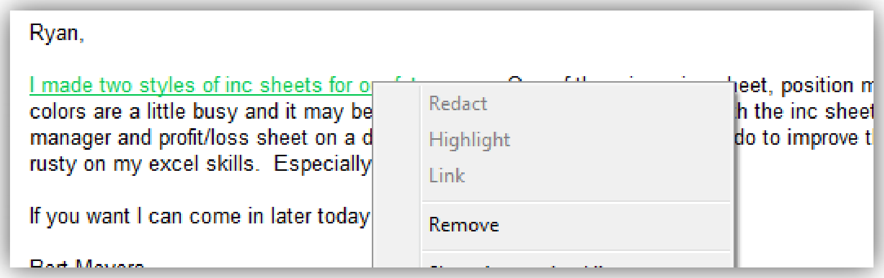
Linked text is shown with green text and underlined.



Linked Text

Left-clicking the link launches the record in a standalone viewer.

If you would like to remove a link, right-click to bring up the right-click menu, and then click **Remove**.



Remove a Link

Note that all links on the active record are displayed in the related items pane, which is outlined later in this document.

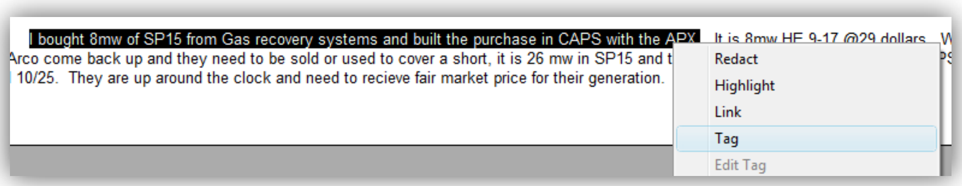
4.2.4 Inline Tagging in the Viewer

You can right-click and tag a section of a record as a choice. This inline tag will apply to the document. Your Relativity administrator can color-code your choices.

You can right-click tag in viewer mode only.

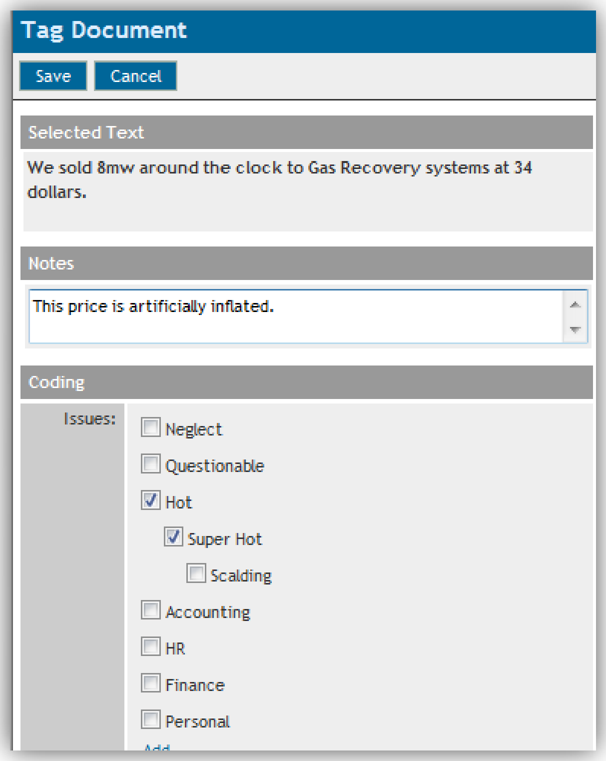
For example, issue-coding documents is a common task. However, if a record is large and covers many topics, it may be difficult to identify which part of the record relates to which issue.

To tag a section of text with a value, select the text, right-click and select **Tag**.



Tagging Text with a Value

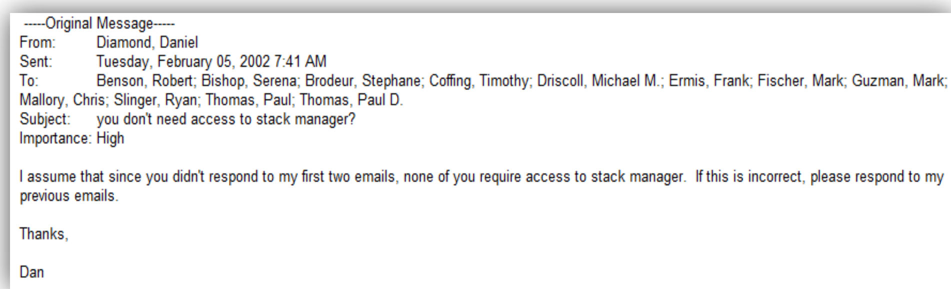
Clicking Tag brings up the inline tag layout.



Tag Document Options

On the tag layout, you can code the correct value and enter a note. Sometimes, tags may overlap.

Consider the following example:


-----Original Message-----
From: Diamond, Daniel
Sent: Tuesday, February 05, 2002 7:41 AM
To: Benson, Robert; Bishop, Serena; Brodeur, Stephane; Coffing, Timothy; Driscoll, Michael M.; Ermis, Frank; Fischer, Mark; Guzman, Mark; Mallory, Chris; Slinger, Ryan; Thomas, Paul; Thomas, Paul D.
Subject: you don't need access to stack manager?
Importance: High

I assume that since you didn't respond to my first two emails, none of you require access to stack manager. If this is incorrect, please respond to my previous emails.

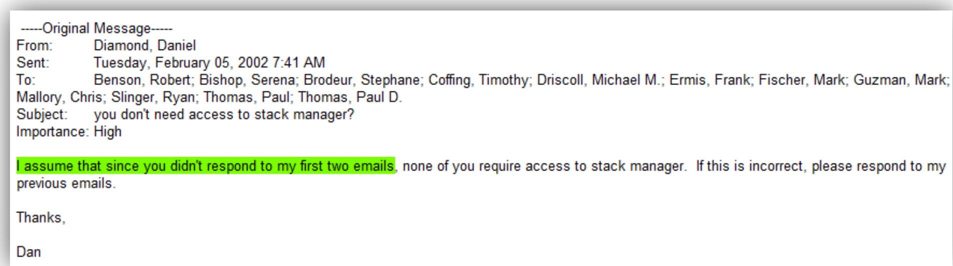
Thanks,

Dan

Overlapping Tags

The first part of the sentence relates to "neglect," but the entire first sentence is "hot." The tag feature allows for overlapping tags.

Below, the first section has been tagged as neglect and is in green.



-----Original Message-----
From: Diamond, Daniel
Sent: Tuesday, February 05, 2002 7:41 AM
To: Benson, Robert; Bishop, Serena; Brodeur, Stephane; Coffing, Timothy; Driscoll, Michael M.; Ermis, Frank; Fischer, Mark; Guzman, Mark; Mallory, Chris; Slinger, Ryan; Thomas, Paul; Thomas, Paul D.
Subject: you don't need access to stack manager?
Importance: High

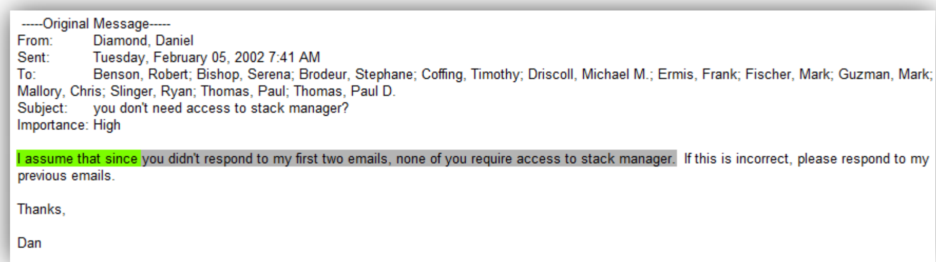
I assume that since you didn't respond to my first two emails, none of you require access to stack manager. If this is incorrect, please respond to my previous emails.

Thanks,

Dan

Tagged as Neglect

In the next example, the second half of the sentence has been tagged with a different value.



-----Original Message-----
From: Diamond, Daniel
Sent: Tuesday, February 05, 2002 7:41 AM
To: Benson, Robert; Bishop, Serena; Brodeur, Stephane; Coffing, Timothy; Driscoll, Michael M.; Ermis, Frank; Fischer, Mark; Guzman, Mark; Mallory, Chris; Slinger, Ryan; Thomas, Paul; Thomas, Paul D.
Subject: you don't need access to stack manager?
Importance: High

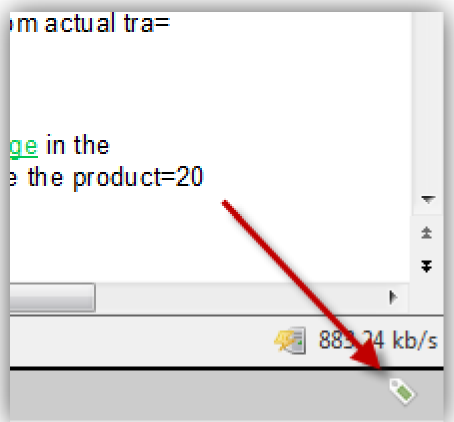
I assume that since you didn't respond to my first two emails, none of you require access to stack manager. If this is incorrect, please respond to my previous emails.

Thanks,

Dan

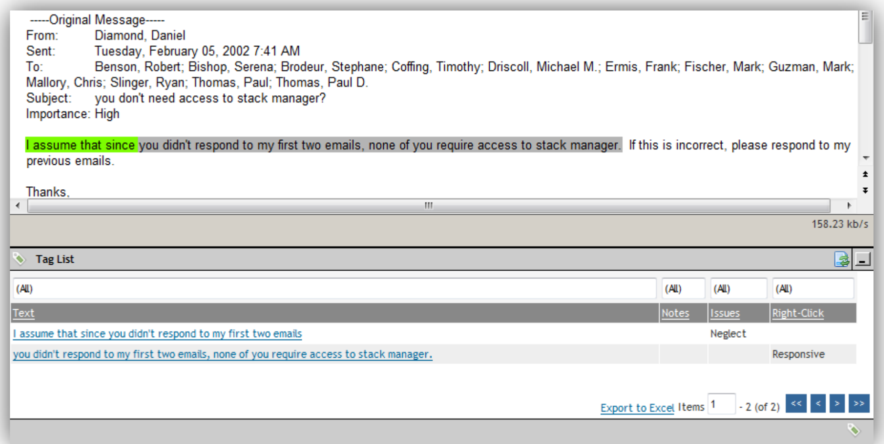
Tagged with a Different Value

To identify all the tags on a document, you can open up the tag list by clicking the green tag icon in the lower-right corner of the viewer window.



Tag Icon

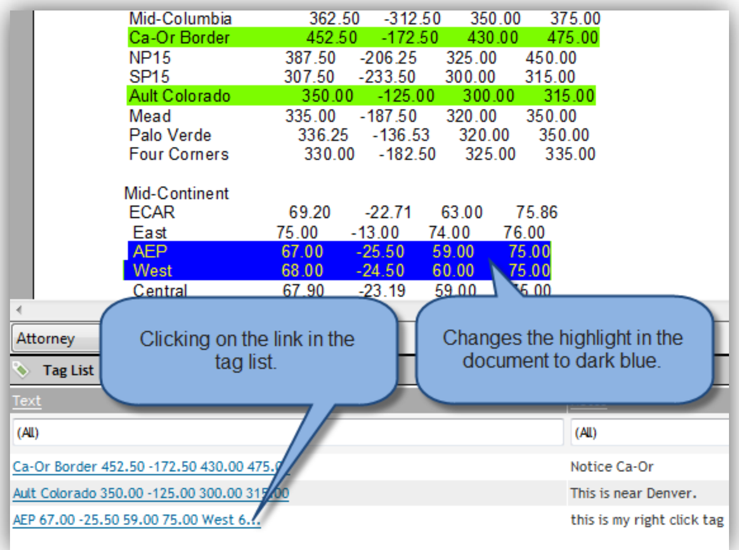
Clicking the tag list icon brings up the tag list pane, which shows all the tags on the record.



Tag List

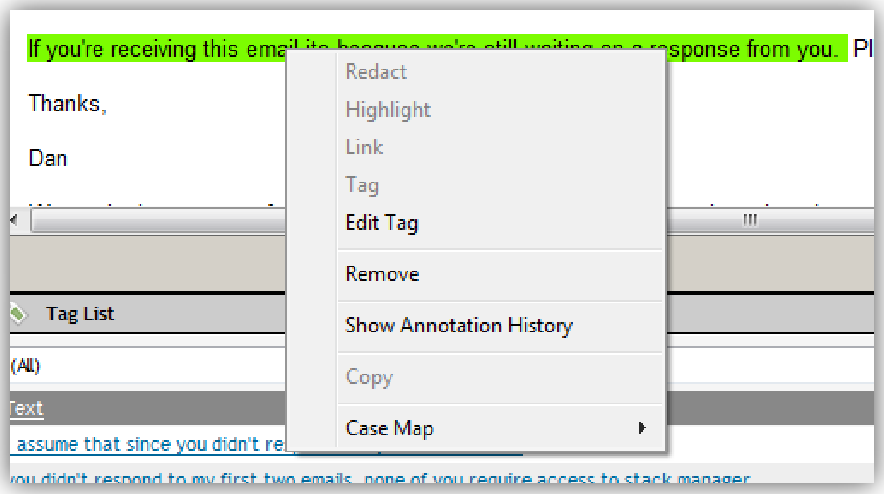
The entries in the tag list pane are hyperlinked. Clicking on the link highlights the active tag in blue in the viewer.

Note that new inline tag you apply will not appear in the tag list pane until you reload the record or refresh the pane. The refresh button is in the upper-right corner of the pane.



Hyperlinked Tags

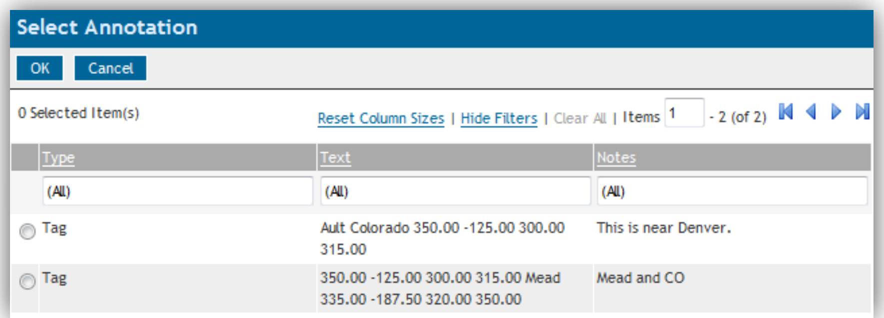
You also can edit or remove a tag. Right-click on the tag to access the menu.



Edit Tag Options

Clicking **Edit Tag** allows you to edit the same layout you used to apply the tag. Clicking **Remove** removes the tag.

If the area you right-click to edit or remove has overlapping tags, you will be presented with a selection box.



Select Annotation Options

Select the tag you'd like to edit or remove, then click **OK** to continue with the action.

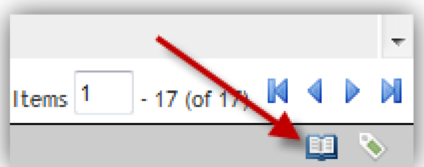
4.2.5 Working with Transcripts

Relativity allows the loading of ASCII transcripts. Transcripts generally are treated like any other documents in Relativity.

Relativity offers word-indexing for transcripts. Word indexes provide a page number list for each word in the file that link to the word location.

Right-click tagging and linking – may also be very useful. Transcripts often are hundreds of pages long, so being able to tag key sections or link to exhibits can be valuable.

Access the word index by clicking the book icon on the lower-right corner of the viewer with a transcript open.

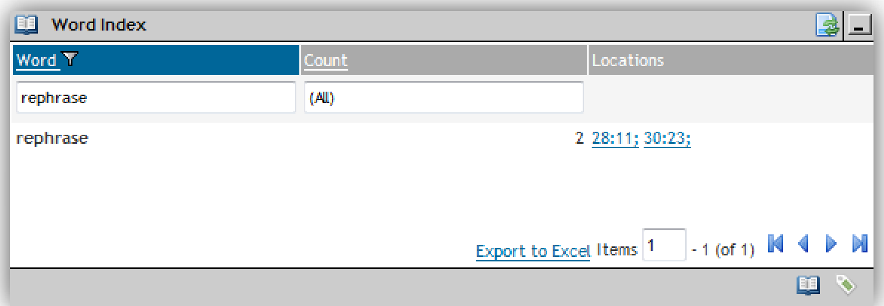


Word Index Icon

The word index displays all non-noise words in the index, the page and line location of each of the occurrences, and the total number of times the word appears in the index.

The word index is sorted in alphanumeric order, so it starts with numbers. It is filterable, so to see all words that start with "a," click show filters and enter "a."

To begin using the word index, enter into the filter bar the term – or part of the term – that you'd like to see. For example, if you wanted to see all of the instances in which there was an objection in the deposition, you would activate the filters, type "objection" in the filter bar, and click enter.

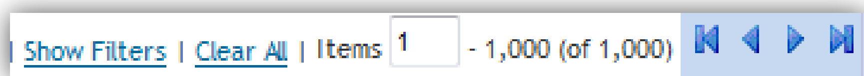


Word Index Entry

That search informs you there are three occurrences of the word objection in the transcript. The locations are listed by page number, a colon, then the line number. They are also hyperlinked; thus, clicking on the location jumps you to that location in the transcript.

4.3 Navigation

You can move through the returned set of documents by using the navigation menu located in the upper-right corner of the core reviewer interface.



Navigation Arrows

You can type a number into the textbox and hit Enter to move to that document. You can use the navigation buttons:

			
Top of first page	Previous page	Next page	Last page

Note that you will be unable to browse past the last document in your returned set. For example, in the above screenshot, there would be no way to get to document 1,001 using the above arrows. For more

information on changing your returned set, please see the Document Set Information Bar section of this document.

4.4 Layouts

Layouts, found in the upper-right corner of the core reviewer interface, are web-based coding forms. They give you access to view and edit document fields. To access the layout list, click the drop-down menu above the layouts pane:

Layouts Dropdown

You may have access to one or more layouts. Layouts correspond to a particular review process or task and will contain only the fields necessary to complete the task. This is done to keep the area uncluttered. If you feel your layout is incomplete, or that you need access to a different layout, contact your Relativity administrator.

Your Relativity administrator can create a personal layout for you – a view that is visible only to you and the Relativity administrator.

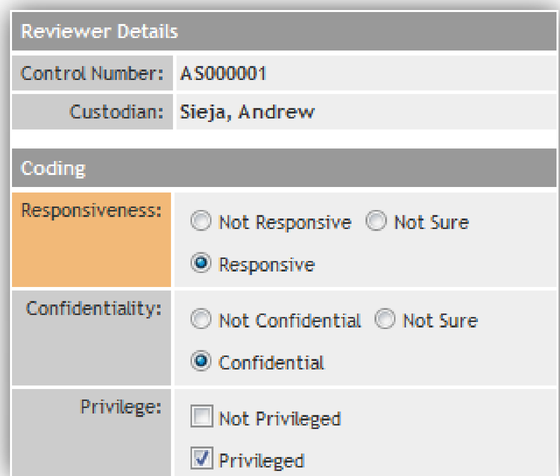
Contact your Relativity administrator to have a personal layout created.

If you simply are learning about the documents, select the layout that provides you with the proper information and browse the documents with the layout in view mode.

If you need to make changes to editable fields, select the correct layout, then click the **Edit** button next to the layout selector.

Edit Layout Button

Any fields in the current layout that have been set to editable are open for changes.

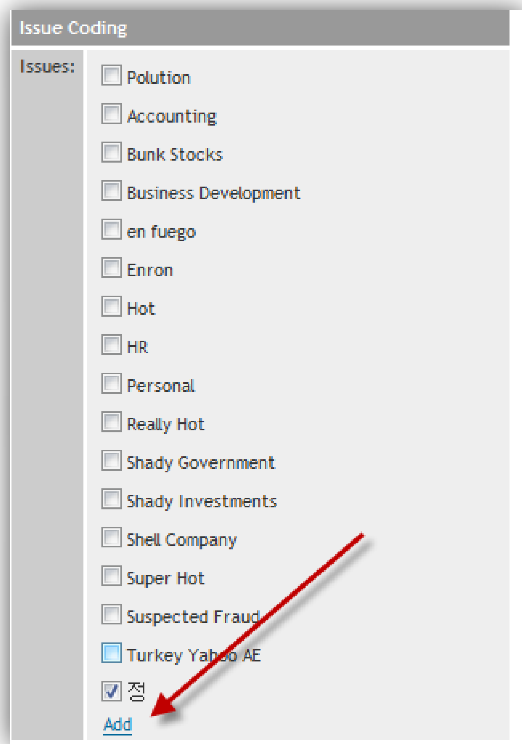


Edit Layout Display

Note that the Responsiveness field above is orange. Any field with an orange label is required. You are not allowed to save any other changes to the document without setting a value for required fields

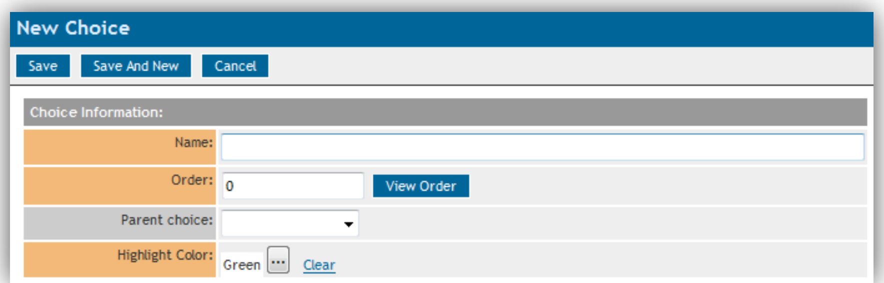
4.4.1 Adding a Choice

You may see a hyperlinked **add** option on a specific field on your layout.



Add Choice Link

Clicking **Add** allows you to add a choice.



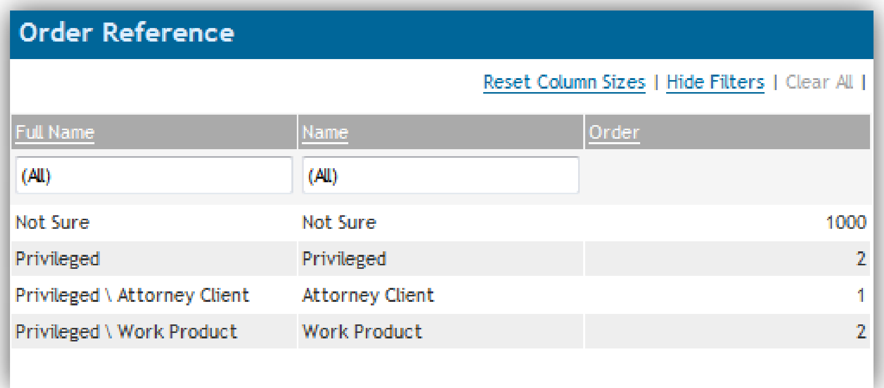
Choice Information Display

The fields to be entered for a choice are as follows:

- **Name** is the choice value.
- **Order** is a number that represents the position of the choice in relation to the field's other choices. The lower the number, the higher the position on the list. Items that share the same value will be sorted in alphanumeric order. Clicking on the **View Order**

button will allow you to see the order of the other items in the choice.

   - Pane order can be any integer (positive or negative). No decimals are allowed.



Full Name	Name	Order
(All)	(All)	
Not Sure	Not Sure	1000
Privileged	Privileged	2
Privileged \ Attorney Client	Attorney Client	1
Privileged \ Work Product	Work Product	2

View Order Window

> It's always a good idea to "order" by 10s, starting with 10, then 20, then 30, etc.
>
> Numbering in groups of 10 allows you to insert an item into any position later in the workspace, without the need to reorder all items.

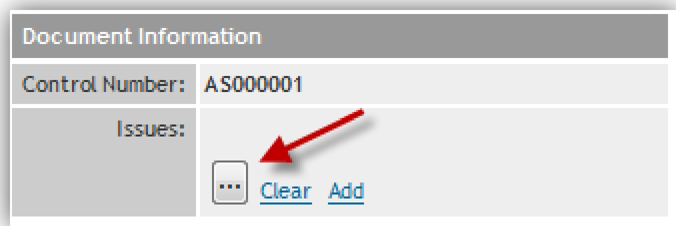
- **Parent choice** allows you to select a parent choice below which the current choice will nest.
   - Once you have set your family of choices and tagged values, editing a parent choice will create inconsistencies.

> If you need to change a parent choice, create a new choice family, mass-edit the applicable documents, and then remove the old choice.

- **Highlight Color** allows you to set the annotation for the choice if it is available for right-click tagging.

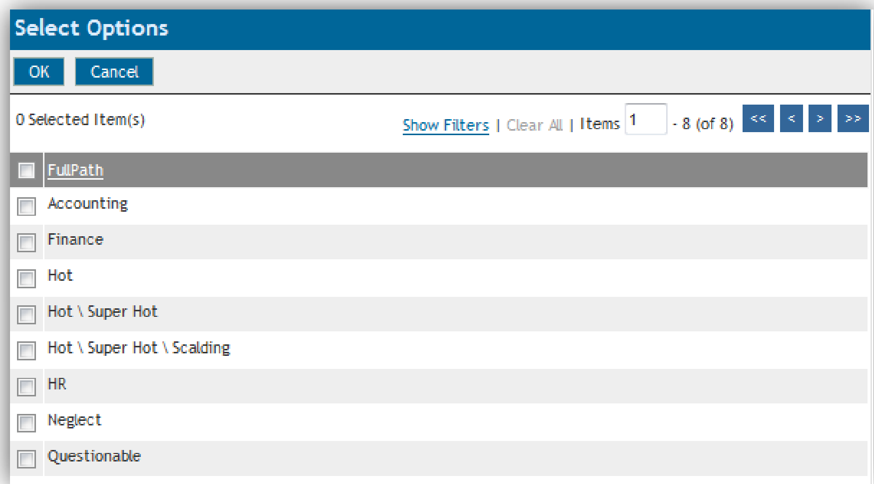
4.4.2 Pop-ups on the Layout

In most instances, you see your choices as checkboxes and radio buttons, as you do above. However, there occasionally may be too many options to viably display on the layout – such as a large list of issues. In those instances, your Relativity administrator may present the field using a pop-up picker.



Pop-up on the Layout

Clicking the ellipsis presents you with all of the choices on the field.



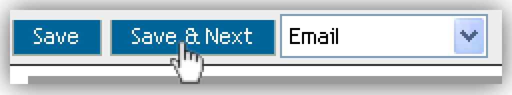
Field Options

Note that you can click **Show Filters** to filter your list if you don't see your desired choice on the screen. For more information on filtering in Relativity, see the Relativity Searching Guide.

All Relativity documentation can be found in the reference guides section of the kCura Support site:

www.kcura.com/relativity-manual

If you are editing only one document, you can click **Save** to register your changes. If you are editing a list of documents, click the **Save & Next** button. This will register your changes and then move to the next document.

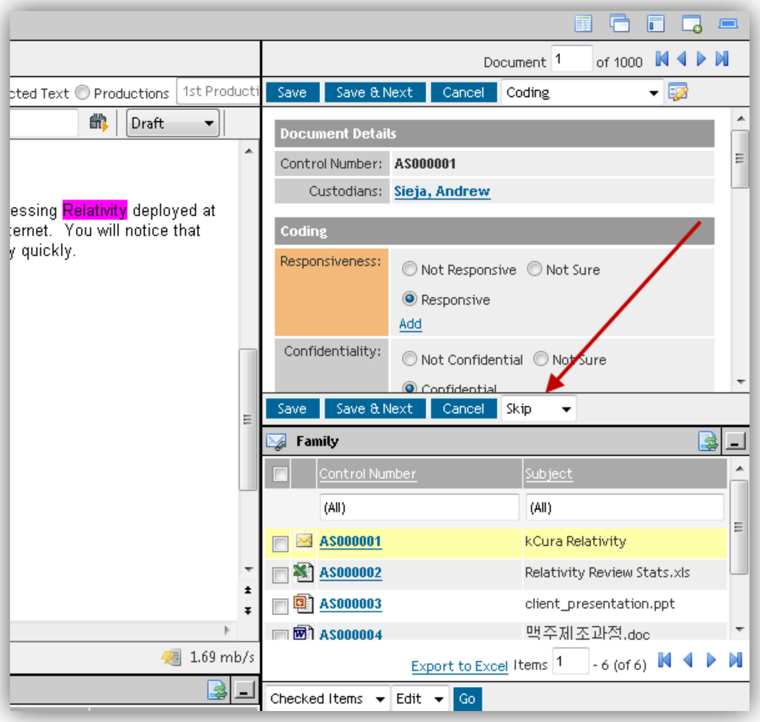


Save & Next Button

4.5 Skip Function

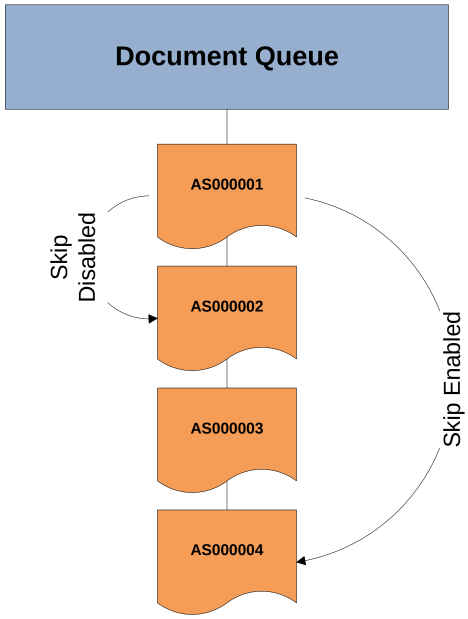
During document review, the skip function can be enabled by to expedite the review process

The skip function sits at the bottom of the layout and will only be available if you have been given the permissions.



Skip Drop-Down

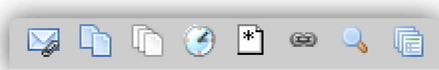
If Skip is selected, clicking the Save & Next button, any documents after the current document that do not already meet the view or Saved Search criteria are skipped until a document that does meet the criteria is found. The illustration below exhibits basic Skip functionality:



4.6 Related Items Pane

The Related Items pane is located at the bottom-right corner of the core reviewer interface. Related items are customizable groups of documents within a workspace. Common examples are email family groups, duplicate groups and near-duplicate groups.

Below the related items pane, you will find the related items menu bar.



Related Items Menu Bar

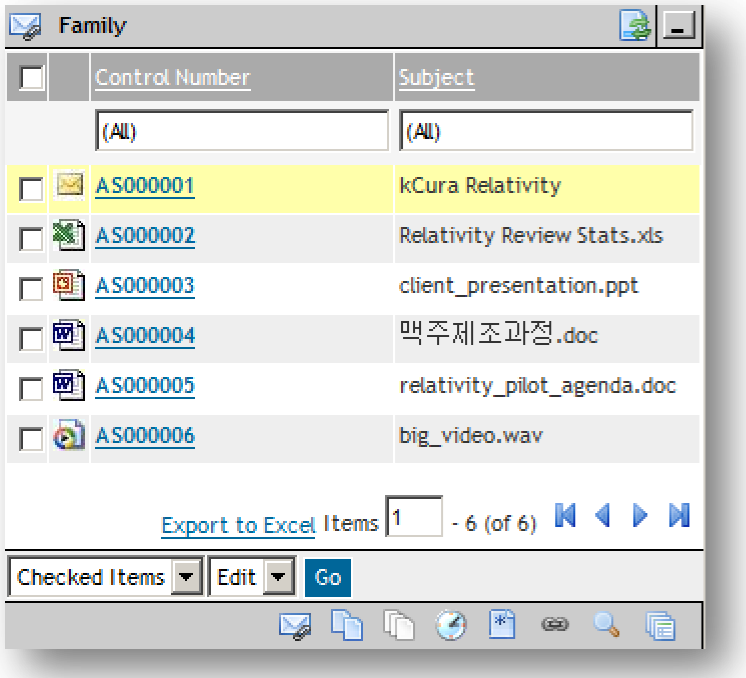
The menu bar functions include the following:

Icon	Name	Description
	Related items	Displays a group of documents related to the active document. Options will vary within the workspace. Hover over each icon in the menu bar to display the name of the item. Examples are familygroup, duplicates or similar documents.
	Document history	Displays a history of actions taken on the current document. You may

		not have access to document history.
	Production	Displays all productions in which the document was included. You may not have access to production information.
	Linked	Displays all linked records on the active document. More information on linking documents can be found in Chapter 3 – Viewer.
	Search results	Displays the results of a Relativity analytics search. More information can be found in the Relativity Searching Guide.
	Batch sets	Shows all the batch sets for the active record. More information about batch sets can be found in Chapter 4 – Checking Out Batches. You may not have access to this section.

The related items pane allows you to quickly identify documents related to the active document. It also allows you to act on those groups of related items.

For instance, in the example of the related items pane below, the active document is an email, highlighted in yellow, with five attachments. You can select some or all of the documents in the related items pane and click **Go**. This brings up all of your active layouts – the same layouts available in the layouts pane. Using these layouts, you can make coding decisions and apply them to the entire range of documents. This is called mass-editing.

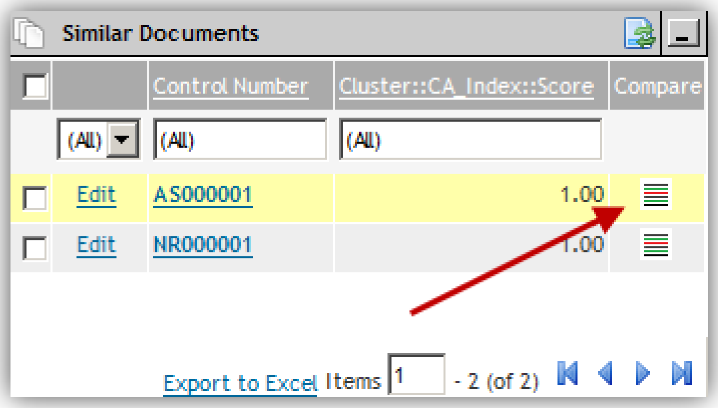


Family Document View

The same principal of mass-editing can be applied to documents in the item list manager back on the case workspace. For more information on mass-editing, see Mass Operations.

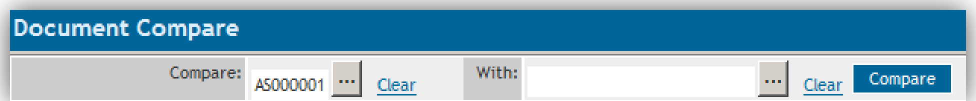
4.7 Relativity Compare

Relativity Compare lets you compare the extracted text of two specific documents, allowing you to understand the key differences. This field can be included in any view and displays the Compare icon.



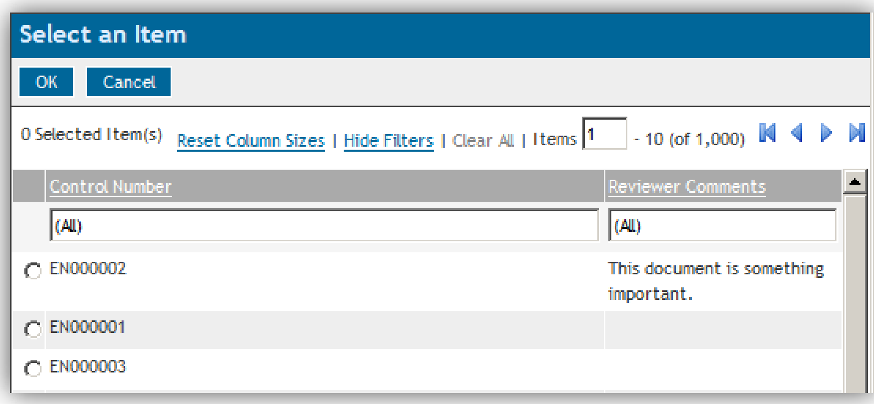
Compare Icon

Clicking the Relativity Compare icon opens the Document Compare selection window.



Document Compare Window

By default the selected document will appear in the Compare window (AS000001). **Click the ellipsis (…)** to the right of the With field to select the document to compare. The Select an Item pop-up displays.



Compare With List

Select the desired document from the list, and then click **OK.**

The Document Compare window is refreshed loading the selected document in the With box. Next click **Compare.**

4.7.1 Comparing Documents

The selected records are compared as shown below.

Compared Text

The similarities and differences between the documents are color coded in the following way:

- Identical text is in **black**
- Added text is in **green**
- Deleted text is in **red**

5 Checking Out Batches

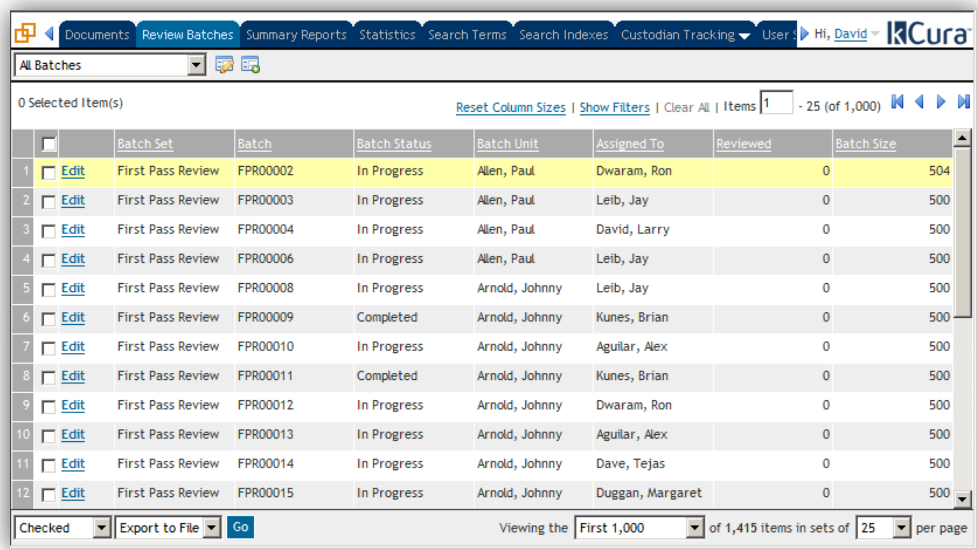
Your workspace workflow may require that you work with batches.

Batches are sets of documents your Relativity administrator can create, allowing you to check out sets of documents to yourself. These batches are found on the Batches tab.

For a full explanation of creating and editing Batches, please see the Relativity Administrative Manual.

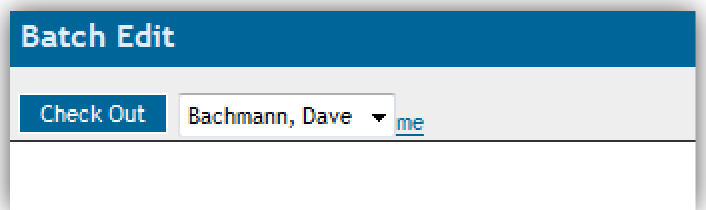
All Relativity documentation can be found at www.kcura.com/relativity-manual.

To check out a batch, go to the Review Batches tab – this may be called simply Batches tab, depending on your case template. Your Relativity administrator may give you instructions on which batches to check out. Find the batch you'd like to check out and click **Edit**. Note that you cannot check out batches that are in progress by another reviewer.



Review Batches Tab

After clicking edit, click **Check Out** on the resulting pop-up to check out the batch. Depending on permissions you might see a dropdown where you can select other uses to assign batches. If the dropdown is not available you are only able to check out batches for yourself.

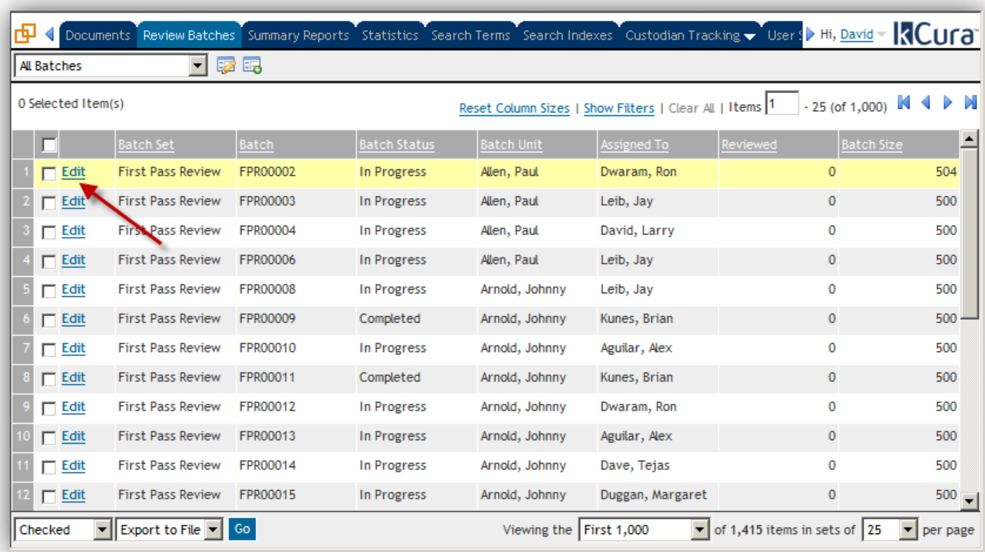


Check Out Batch Button

Your Relativity administrator should have provided you with a view to display your checked-out documents. It likely is called "my checked-out documents" or something similar.

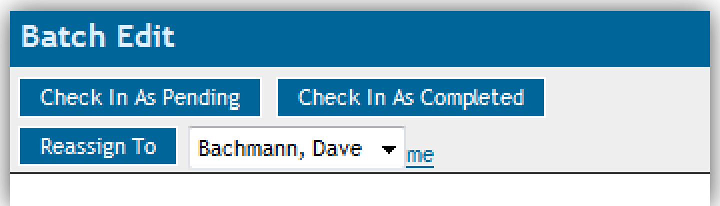
5.1 Checking a Batch Back in

When you are finished working with your batch, go back to the batches tab. Find your batch and click Edit.



Edit Batch Link

Clicking edit will bring up the following pop-up. Depending on your work progress, check the batch back in, either as pending, or as completed. Depending on permissions you might see a dropdown and a button to reassign a batch.



Check In Batch Options

6 Mass Operations

Although most user-level functionality is covered in the Relativity Reviewer manual, many mass operations are primarily administrative functions. Access to each of these mass operations can be granted individually.

> To select multiple items in a list, select one item, click/hold the Shift key, and select a second item, to get the range of everything in between.

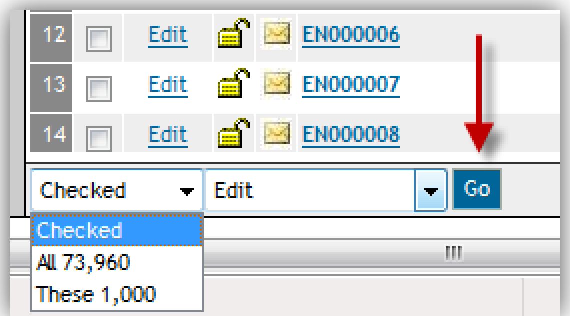
6.1 Mass Edit

Mass Edit allows you to edit field and coding values for multiple documents at once. You can use any layout to which you have access.

On the item list, choose whether you'd like to edit all searchable items, checked items, or these items in the current returned set.

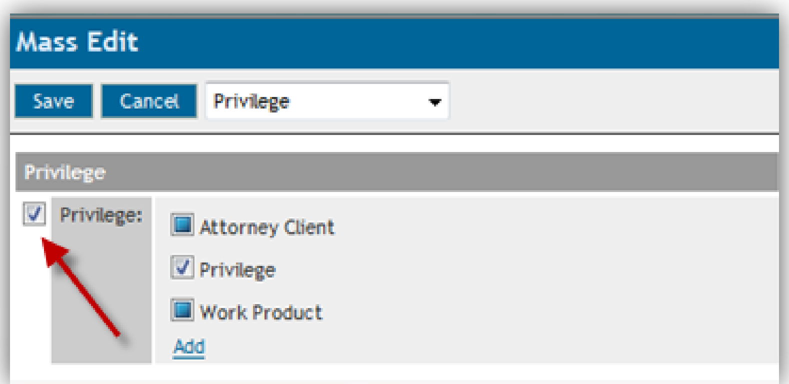
For a full explanation of the searchable set and returned set, please see Chapter 2.

Then, ensure that Edit is selected in the dropdown. Click **Go**.



Mass Operation Go Button

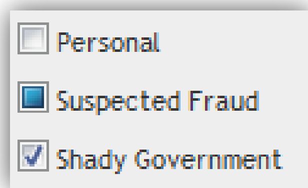
Clicking Go brings up the mass edit form. Using the dropdown, you can select from all layouts you have rights to see.



Mass Edit Form

You must check any fields you'd like to edit. Options set in unchecked fields will not be applied.

There are three options for multiple-choice field values, shown below.



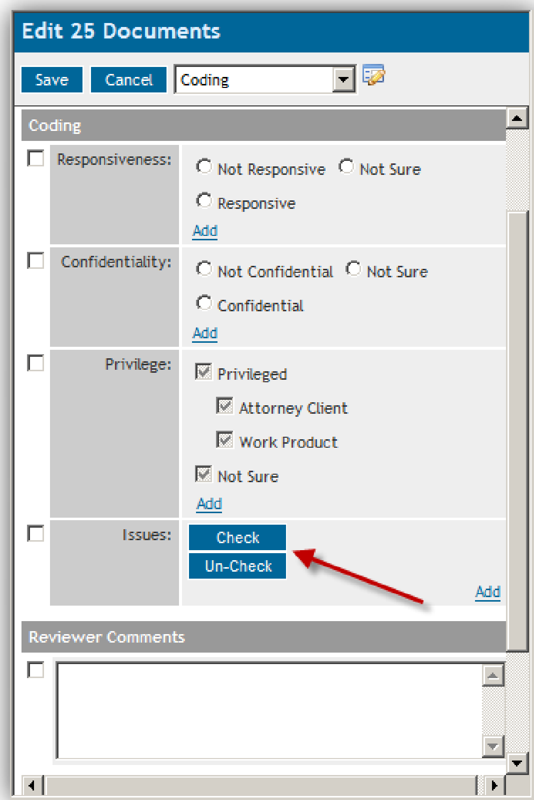
Multiple- Choice Field Values

The first option, shown on the Personal choice, removes the value from any of the selected documents.

The second option, shown on the Suspected Fraud choice, leaves any values on the selected documents as-is.

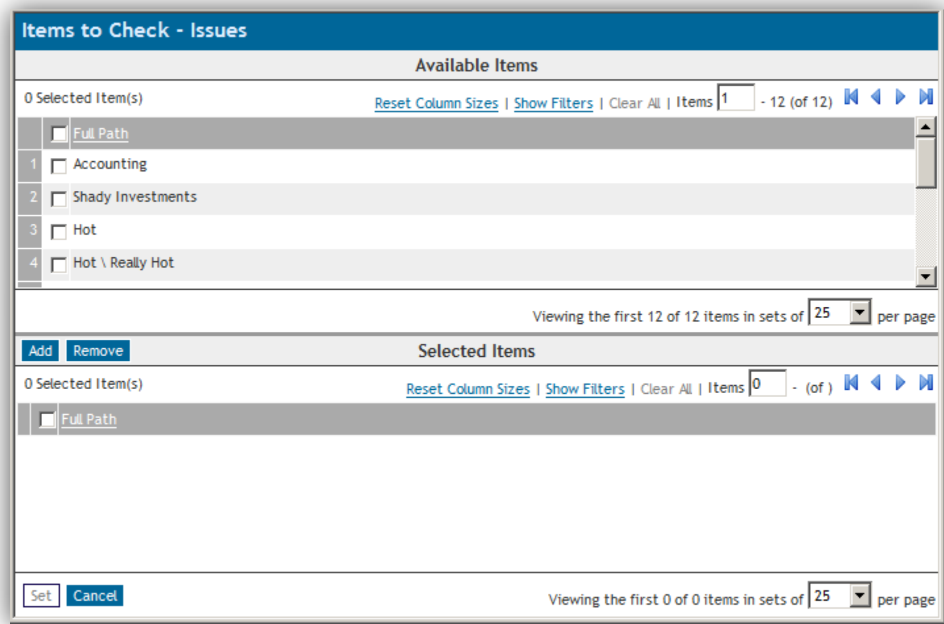
The third option, shown on the Shady Government choice, applies the option to all selected documents.

In the mass edit window there are two options for editing multi-choice fields - a checkbox or a pop-up picker. When the pop-up picker has been selected as the display type during the layout build, there are two options to edit the field; **Check** and **Uncheck**. For information see the Layouts section.



Mass Edit Multi-Choice Fields

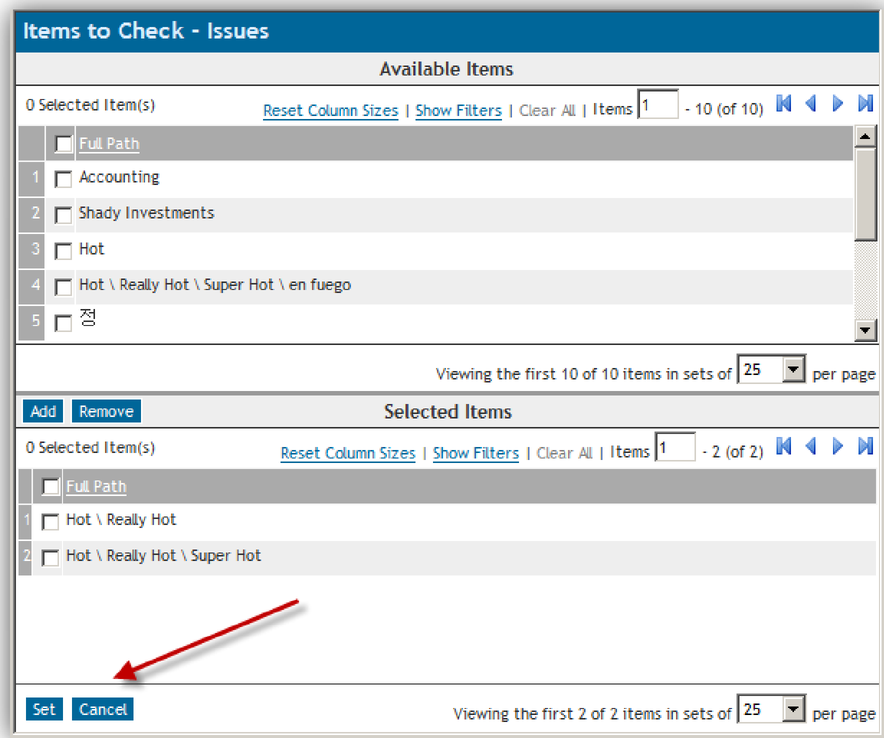
Clicking the Check button allows you to create a list of items to add to the field. Uncheck allows you to create a list of items to remove from the field. Items not selected will remain unchanged. Clicking either Check or Uncheck opens the Available Items window.



Available Items Window

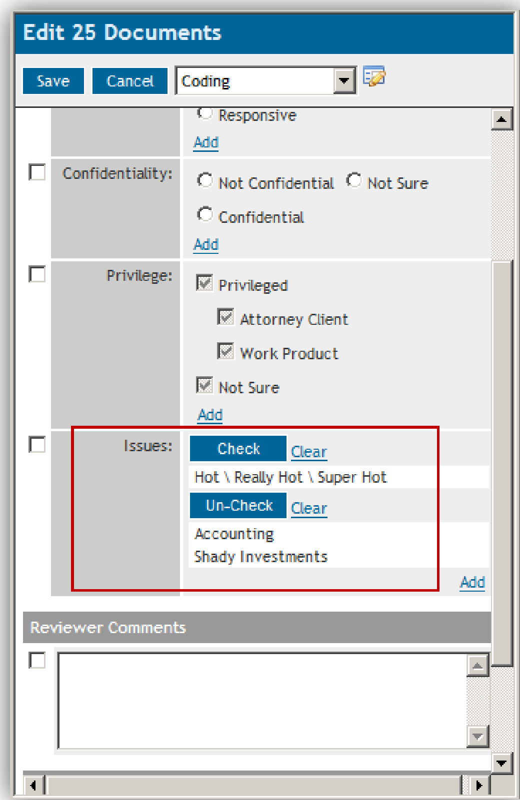
From the Available Items list, you can move choices and objects into the Selected Items list below. Select the check box next to the desired selection and click **Add**. This will build a list in the bottom window of selected items. To remove something from this list select it and click **Remove**.

Click **Set** to proceed with the action to Check or Uncheck the items from the field. **Cancel** stops any action. Items not selected will remain unchanged.



Set/Cancel Buttons

Below, the mass edit form reflects checked and unchecked objects and choices.



Multi-Choice Mass Edits Set

Once values have been set, a **Clear** link appears next to the Check and/or Un-Check buttons. This allows you to clear the set values without having to return to the Items to Check window and remove them. Note also the Add link in the bottom right corner of the field setting. This allows you to add a new choice to a multi-choice field.

Clicking **Save** at the top of the form will save the edits you made.

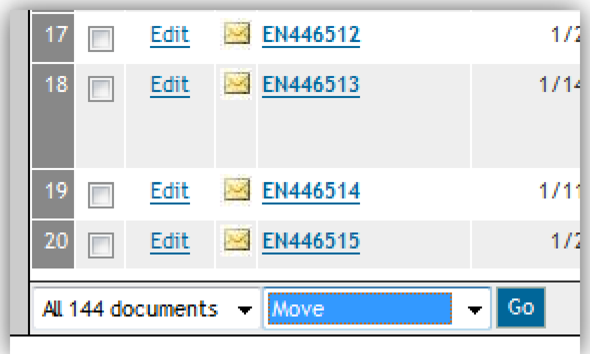
6.2 Mass Move

Mass Move allows you to move selected documents to a new folder.

On the item list, choose whether you'd like to move all searchable items, checked items, or these items in the current returned set.

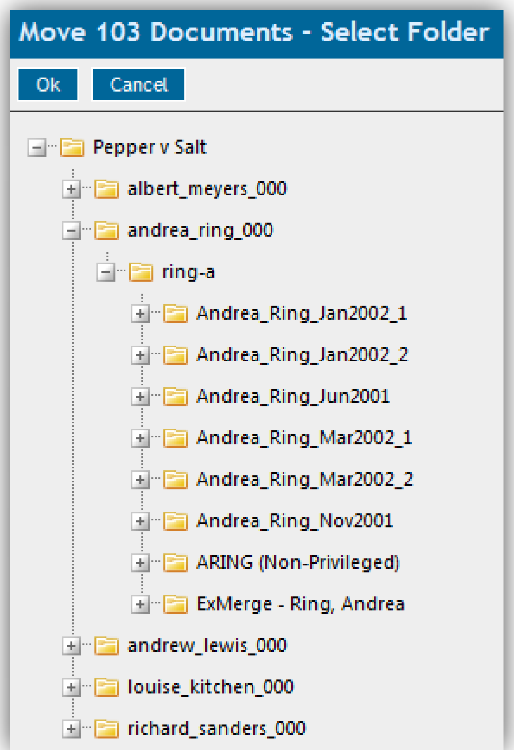
For a full explanation of the searchable set and returned set, please see Section on Views.

Then, ensure that “move” is selected in the dropdown. Click **Go**.



Mass Move Option

Clicking Go launches the mass move select folder form. Select the target location and click **OK**. Note that all documents will be moved to the target directory. The subdirectory structure of the source document will not be maintained.



Select Folder Display

If you mass-move any documents, any custom security applied to those documents is lost, and the document inherits the rights of the parent folder.

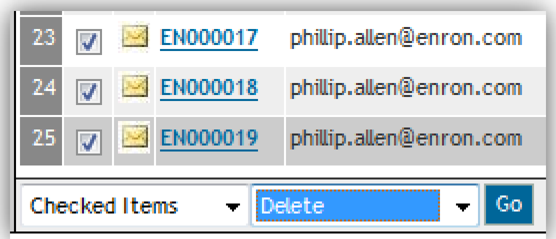
6.3 Mass Delete

Mass Delete functionality allows you to remove entire documents or specified document components in one action.

In addition to deleting the specified items from the workspace, these actions also delete the associated files from the file servers. This action cannot be undone. Accordingly, please use great care when performing a mass delete.

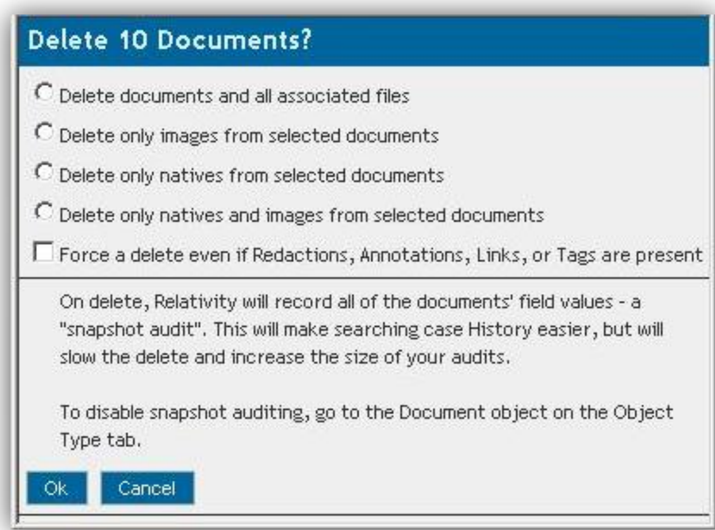
On the item list, choose whether you'd like to delete all searchable items, checked items, or these items in the current returned set.

Then, ensure that **Delete** is selected in the dropdown. Click **Go**.



Mass Delete Option

You will be prompted to choose and confirm which document attributes and/or whole documents you would like to delete.



Document Delete Options

The following options are available when performing a Mass Delete:

- **Delete documents and all associated files** deletes the entirety of all selected documents. This includes images, natives, and field values.
- **Delete only images from selected documents** deletes only the images from selected documents, leaving the natives and documents' field values in place.
- **Delete only natives from selected documents** deletes only the natives from selected documents, leaving the images and documents' field values in place.
- **Delete only natives and images from selected documents** deletes only the images and natives from selected documents, leaving the documents' field values in place.
- **Force a delete even if Redactions, Annotations, Links, or Tags are present** will allow the Mass Delete to successfully complete, even if the selected documents contain these additions.
    - If this box is not checked, and redactions, annotations, links, or tags are present, sections of the mass delete will not complete. A warning will be generated.
    - Deleting is done in batches and if an error occurs the remaining item in that batch will be left and the system will continue to the next batch.
    - If this box is checked, any and redactions, annotations, links, or tags will be deleted along with the designated items.

Click **OK** to proceed. This operation is final and cannot be undone.

6.3.1 Enable/Disable Snapshot Auditing on Delete

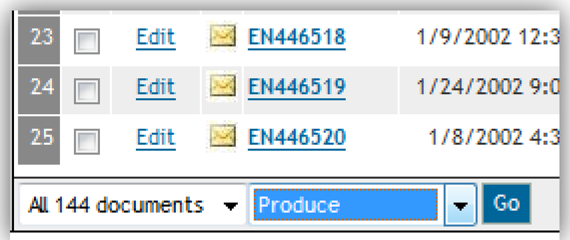
When performing a delete, you have the option of creating a snapshot of the current field values of the deleted record – a snapshot. This data will be stored in the history for the workspace. While enabling this property can be useful when searching the workspace history, it can also significantly increase the size of your workspace's audit table. The default value is set to enable.

6.4 Mass Produce

Mass produce allows you to add documents to an open production, and to set the manner in which those items will be produced. For example, you could run a search for all items you'd like to produce, and then filter for Excel documents. You could add those to your production as native only. You could then find the remaining records you'd like to produce, and add them to your production as images only.

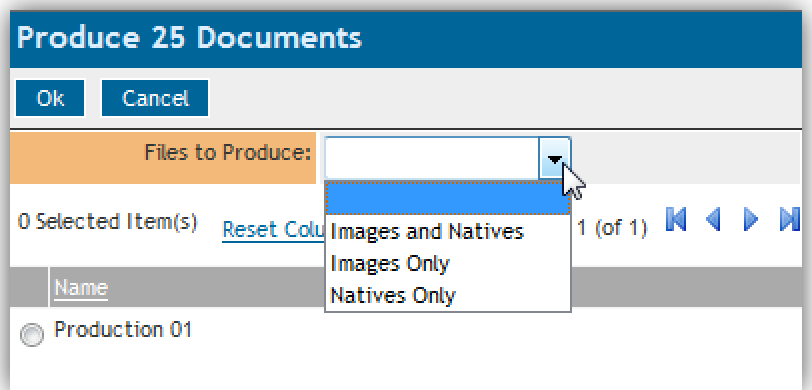
On the item list, choose whether you'd like to produce all searchable items, checked items, or these items in the current returned set.

Then, ensure that **Produce** is selected in the dropdown. Click **Go**.



Mass Produce Option

Clicking **Go** launches the Mass Produce form.



Mass Produce Form

Select your production from all open productions. Production sets that have been produced will not be available.

- **Files to produce** allows you to select which versions of each document will be produced.
  - **Images and natives** will include both natives and images for the selected records.

> If you are producing images and natives, ensure that you are not including natives for images with redactions.
>
> There is no way to redact the exported natives, so exporting natives with redacted images would expose the information behind the redactions.

- Images only will include only images for the selected records.
- **Natives only** will include only natives for the selected records.

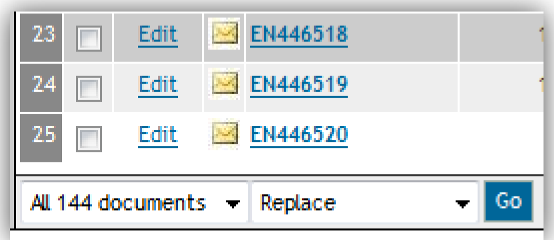
The fields available on this form are set by a system view. For more information on editing this view, see Views – Editing a View – System Views.

6.5 Mass Replace

Mass Replace allows you to replace existing field text with new text.

On the item list, choose whether you'd like to replace text in all searchable items, checked items, or these items in the current returned set.

Then, ensure that **Replace** is selected in the dropdown. Click **Go**.

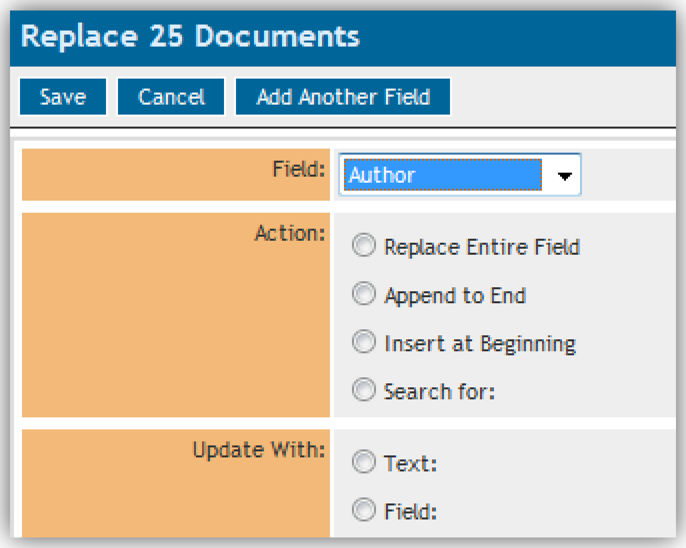


Mass Replace Selected

The fields are:

- **Field** is the field you would like to update. Select from workspace fixed length or long text fields.
- **Action** sets the action to be performed:
  - **Replace entire field** will replace the field entirely.
  - **Append to end** will add the new value to the end of the field.
    - A delimiter option will appear – enter a character to separate the existing and appended values.
  - **Insert at beginning** will add the new value to the beginning of the field.
    - A delimiter option will appear – enter a character to separate the existing and prepended values.

        - **Search for** allows you to search (and thus replace) only selected text in the field instead of the entire field.
            - A new **text** option will appear, allowing you to enter the text to be replaced.
- **Update with** sets what you would like to apply to the field.
    - Text allows you to add text to the field.
    - Field allows you to add another field's value to the field set above.
- Click **Add Another Field** at the top of the form to add an additional replacement action to the form.
- Click **Save** to execute the mass-replace.



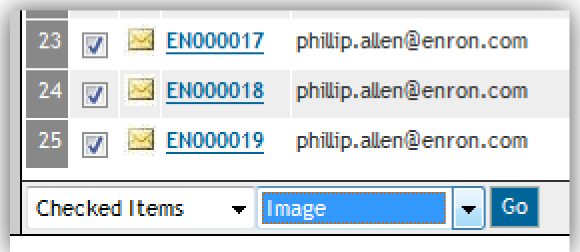
Mass Replace Options

6.6 Mass Image

Mass Image creates TIFF images for selected documents

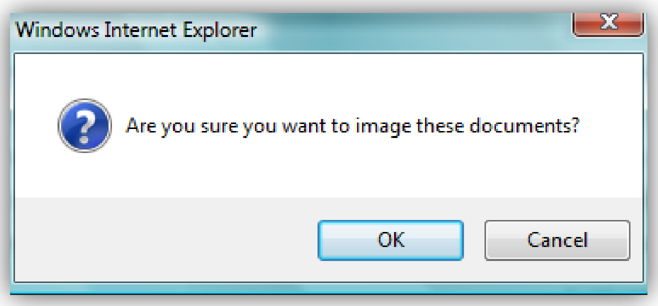
On the item list, choose whether you'd like to image all searchable items, checked items, or these items in the current returned set.

Then, ensure that **Image** is selected in the dropdown. Click **Go**.



Mass Image Selected

Clicking **Go** will prompt you to confirm you would like to create the TIFFs. Click **OK** to create the TIFFs. Depending on the number of TIFFs being created, this may take some time. Additionally, please note that TIFF on-the-fly jobs will take precedence over batch TIFF jobs.



Mass Image Confirmation

The mass image operation uses the same technology as the Relativity native file viewer.

For a full listing of the known issues with the viewer, see the viewer details document:

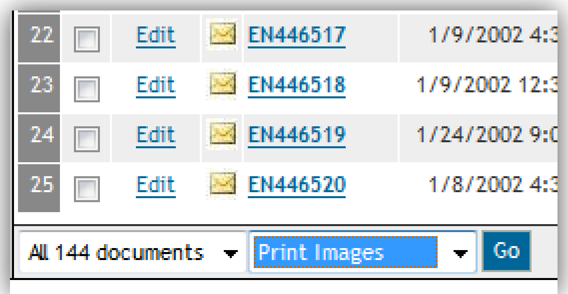
[Relativity Viewer Details]

6.7 Mass Print Image

Mass Print Image allows you to batch-print document TIFF images.

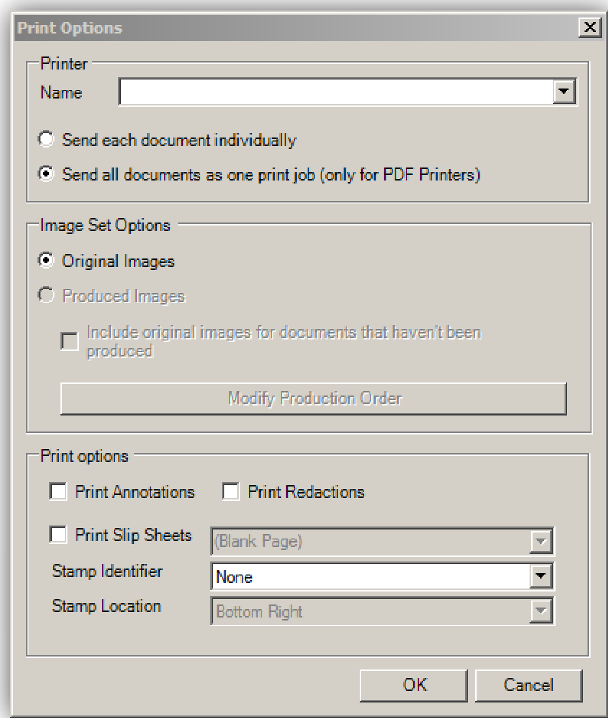
On the item list, choose whether you'd like to print all searchable items, checked items, or these items in the current returned set.

Then, ensure that **Print** is selected in the dropdown. Click **Go**.



Mass Print Images Selected

Click **Go** to set your print settings.



Print Options Screen

- **Printer Name** drop down allows you to select any local printers.
  - **Send each document individually** makes each document print as a separate print job.
  - **Send all documents as one print job** will combine all documents into one print job. This is only intended for PDF creation using a PDF print driver and will create one PDF from all the documents selected. In order to use this option you need to verify your viewer is version 5.08 or later.

> Sending all document as one print job to a physical printer is not recommended. Depending on your printer setup it can cause issues with your print queue.

- **Image set options**:
    - Select **original** if you'd like to print non-produced versions of the documents.
    - Select **produced images** if you'd like to print produced versions.
        - If you select produced documents, you can select which version of the document you'd like to print by clicking **modify production order**.
        - If a document was not part of the selected production, you can check "Include original images for documents that haven't been produced" to include the original instead.
- **Print options:**
    - **Print annotations** will include any highlighting on original images.
    - **Print redactions** will include any text or stamp redactions.
    - **Slipsheets** will include a slipsheet between documents. Your slipsheet can be:
        - **(Blank page)** will include a blank page.
        - **(Stamp identifier)** will include a page with the document identifier stamped.
        - **<Document layouts>** will include a slipsheet with the fields from any document layout. The values for the proceeding document will be shown for those fields.
    - **Stamp identifier** allows you to select whether you'd like to print any identifier value on the pages.
        - **None** will not include any identifier.
        - **Document identifier** will include the images' document identifier.
        - **Page identifier** will include the images' page identifier.
    - **Stamp location** allows you to designate where the identifier will be stamped. Select from:
        - Top left
        - Top center
        - Top right
        - Bottom left
        - Bottom center

        ▪ Bottom right

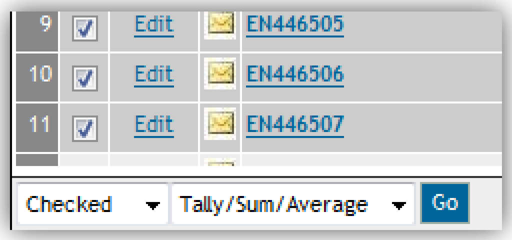
▪ **Markup set** allows you to select which markup set's redactions and annotations will be applied. This option will be present only if there are two or more markup sets on the workspace that you have rights to see.

6.8 Tally/Sum/Average

Tally/sum/average allows you to tally, sum and average the values of any numeric fields. This commonly is used to determine the number of pages in a print job or production.

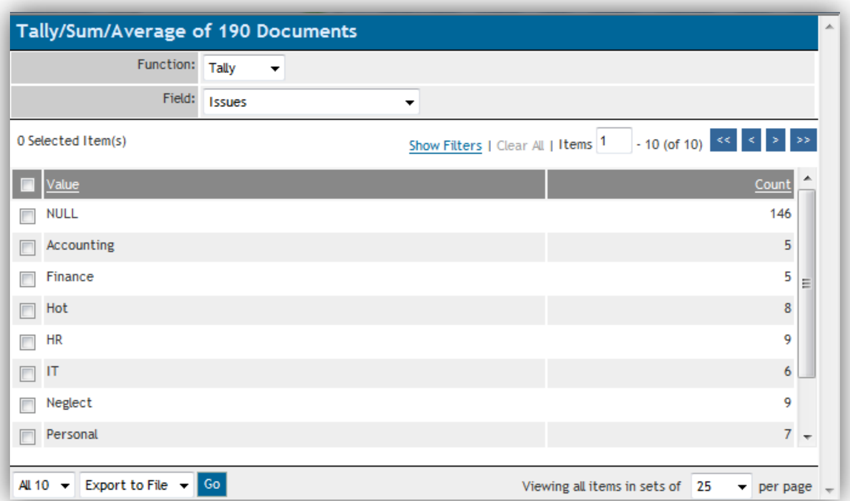
On the item list, choose whether you'd like to tally/sum/average all searchable items, checked items, or these items in the current returned set.

Then, ensure that **Tally/Sum/Average** is selected in the dropdown. Click **Go**.



Tally/Sum/Average Selected

Clicking Go launches the Tally/Sum/Average form.



Tally/Sum/Average

The fields are:

- **Field** is the field to be calculated.
- **Function** is the function to be performed:
  - **Tally** provides a list of unique items and the total number based on the items selected.
  - **Sum** tallies all selected documents' values for any number field.
  - **Average** finds the average values of all selected documents' values for the specified field.

The results of a tally are similar to a summary report; it outlines the values of a field and the count for each. After receiving your results, the following actions may be performed:

- Filter the results
- Clear All filter text
- Browse through the results using the blue arrows
- Sort the results
- Export results to an external file

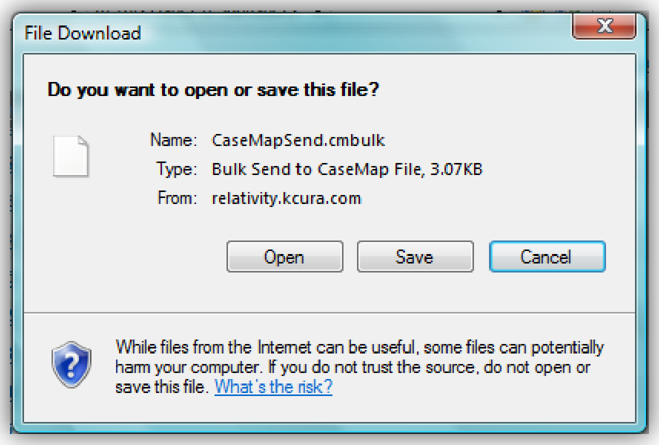
6.9 Send To CaseMap

You can use the **send to CaseMap** feature to bulk-send items to your CaseMap database, versions 7 and above. To perform the bulk send, you will need to have CaseMap installed and open to the correct case.

There is a Relativity system view called CaseMap fields that controls which fields are sent to CaseMap. See Chapter 13 – Views for more information about editing views.

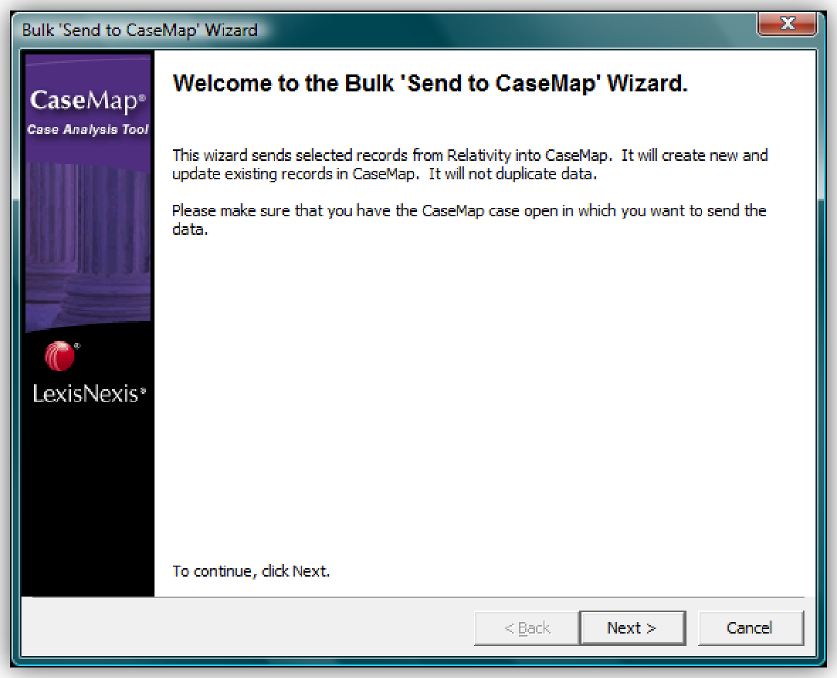
On the item list, choose whether you'd like to run a send-all items, only checked items or these items in the current returned set. Select "send to CaseMap" in the dropdown and click **Go**.

You may be prompted to open or save a file, CaseMapSend.cmbulk. If so, click **Open**.



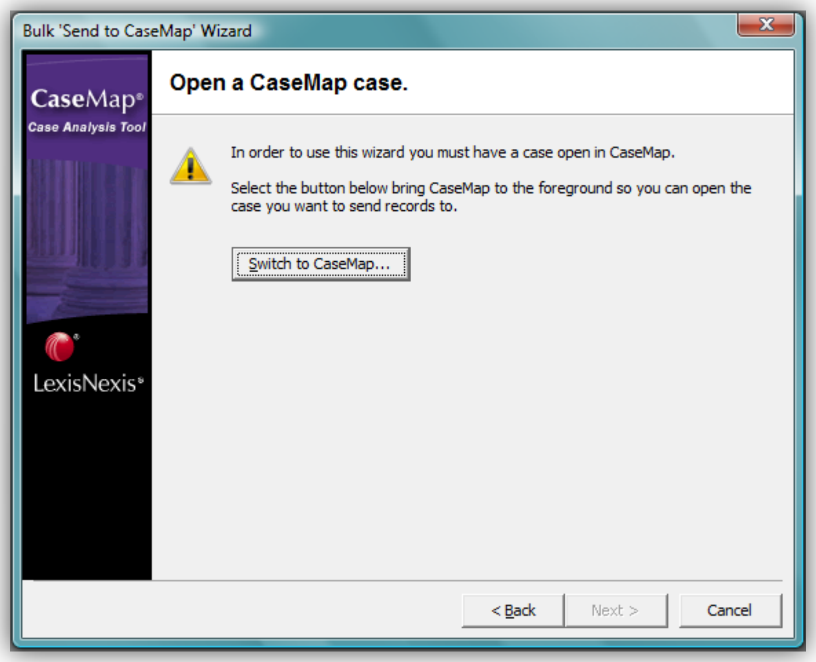
Save CaseMap File Option

Clicking **open** will launch the **bulk send to CaseMap wizard**. Click **next** on the main screen.



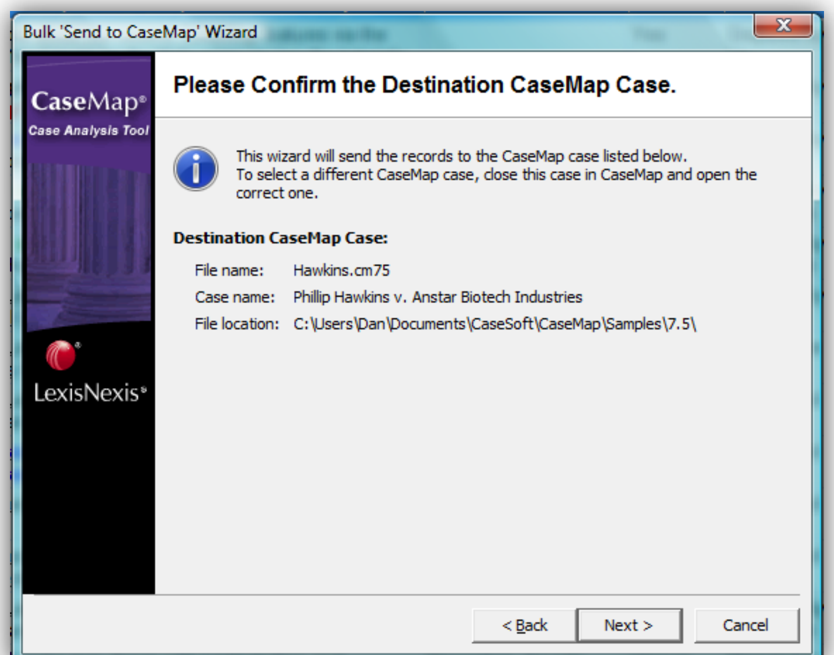
Send to CaseMap Screen

If you do not have CaseMap open, you will be prompted to launch the application. Once CaseMap is open, the wizard will prompt you to switch to the application. Click the **Switch to CaseMap button**, then click **next**.



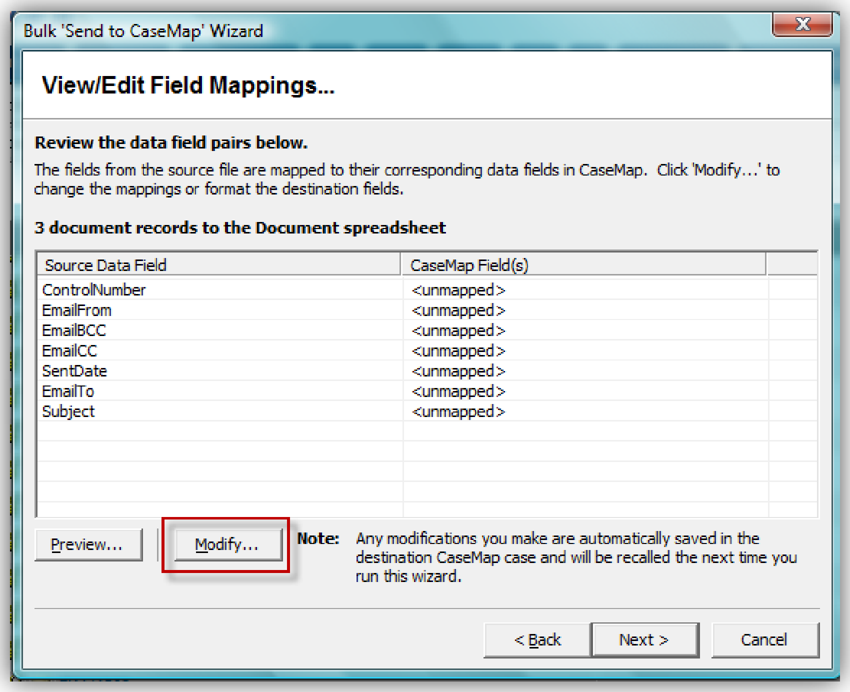
Switch to CaseMap Option

The wizard will ask you to confirm that the workspace you have open is the correct target workspace. If the workspace listed is the correct target workspace, click **Next**.



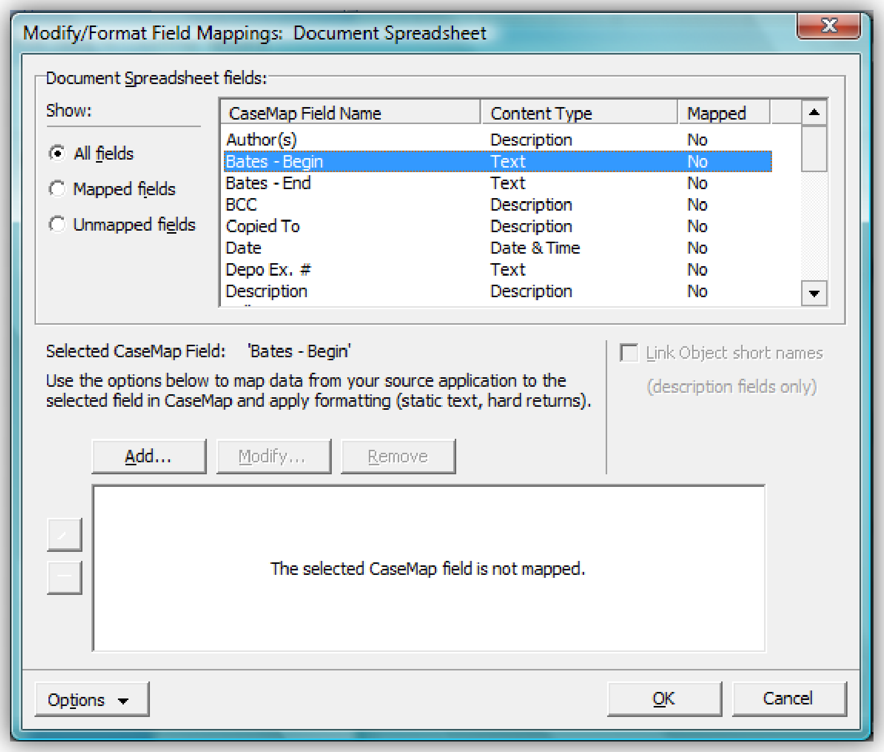
Confirm Destination CaseMap

Clicking Next brings up the View/Edit Field mappings section**,** allowing you to map the Relativity fields (set in the CaseMap fields view) to CaseMap fields. The first time you go through this process, you will need to map the fields. Click **Modify** to set the correct field mapping. CaseMap should automatically populate the matches on subsequent bulk sends.



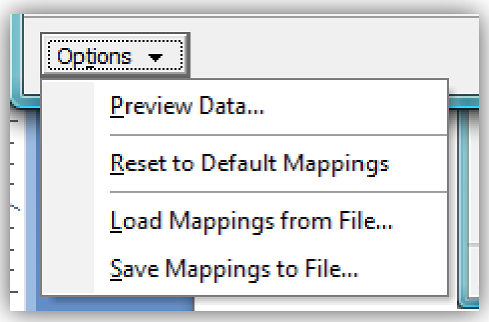
View/Edit Field Mappings

Clicking Modify will bring up the field mapping section of the wizard.



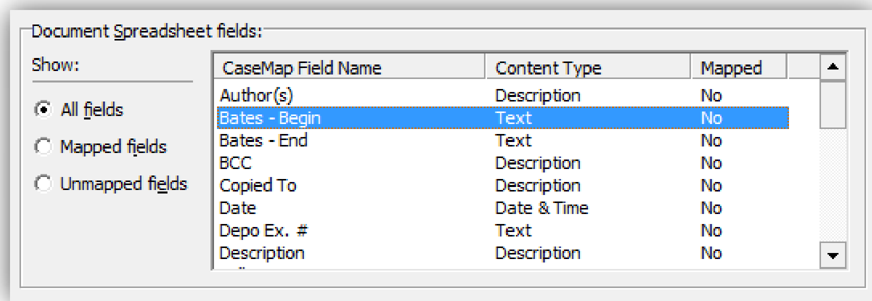
Modify Field Mappings

You can use the options to preview any of the data, reset the mappings, load mapping settings from a previous load, or save your current mappings.



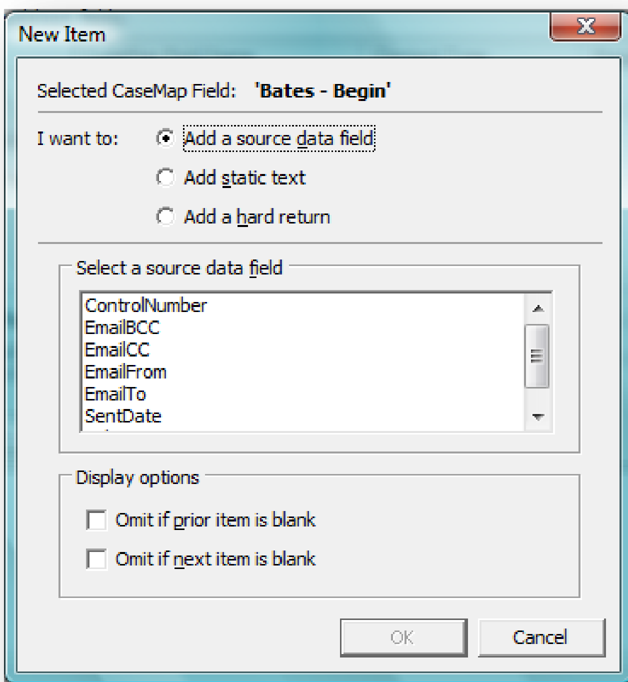
Preview Options

To map your fields, go to the **Document Spreadsheets fields** and double-click on the field you'd like to map.



Document Spreadsheet Fields

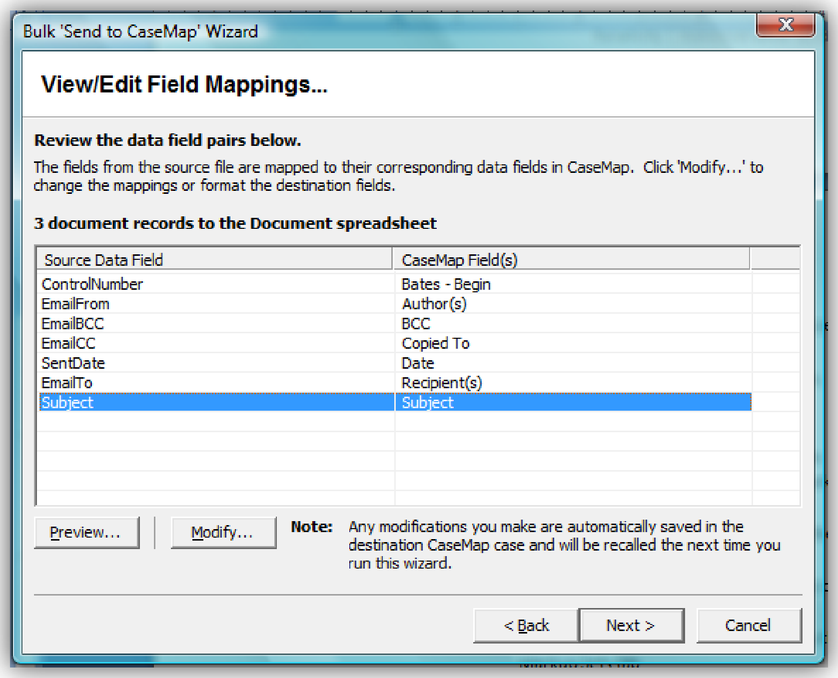
Double-clicking the mapping will open the New Item box. Select the **Relativity** field from the **select a source data field** box, and then click **OK**.



New Item Options

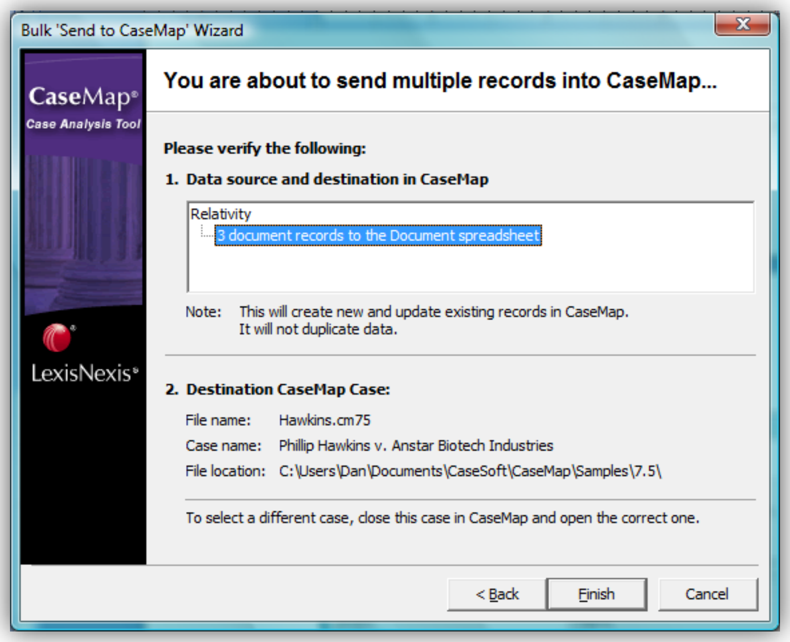
Repeat the above for all fields you would like to map, then click **OK** in the **bulk send to CaseMap wizard**.

Clicking **OK** brings you back to the second screen of the wizard. Review the matches, then click **Next**.



View/Edit Field Mappings

Clicking Next will present a final confirmation screen. Click **Finish** to complete the send.



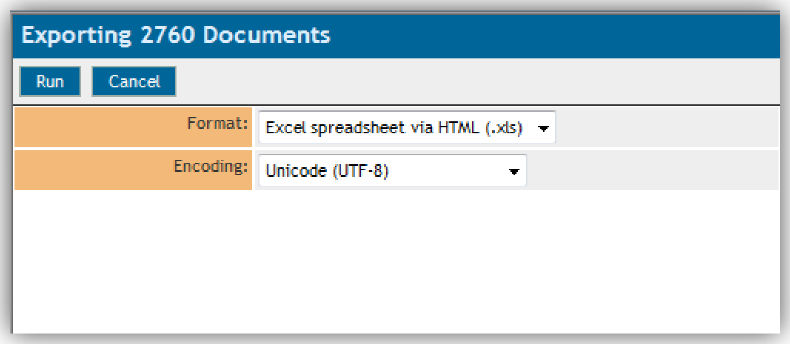
Send Confirmation Screen

6.10 Export to File

Export to File allows you to export the contents of the current list to a file. Any items and fields in the current view or report will be exported. Unicode characters are allowed.

On the item list, choose whether you'd like to export all searchable items, checked items, or these items in the current returned set.

Then, ensure that **Export to File** is selected in the dropdown. Click **Go**.



Exporting Documents Screen

In the export window, select:

- **Format:**
  - **Excel spreadsheet via HTML (.xls)** will create an Excel file.
  - **Comma Seperated Values (.csv)** will create a comma delimited text file
  - **Concordance DAT Format (.dat)** will create a DAT text file with the standard Concordance delimiters.
- **Encoding**
  - Select the desired encoding for the output file.

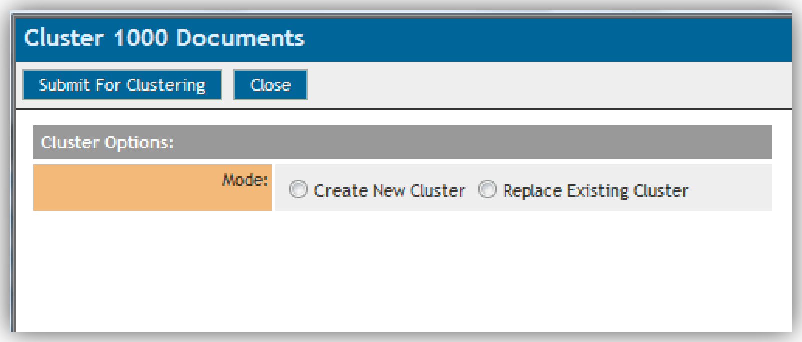
To export the file, click **Run**. To cancel the export, click **Cancel**.

6.11 Cluster

Clustering allows you to use an existing Relativity Analytics index to identify conceptual groups within an entire workspace or subset of data. These conceptual groups will form a cluster and can be browsed on the cluster browser. Unlike other uses of Relativity Analytics, clustering does not require you to submit an example to the index – only a set of documents you would like clustered.

On the item list, choose whether you'd like to cluster all searchable items, checked items, or these items in the current returned set.

Then, ensure that **Cluster** is selected in the dropdown. Click **Go**.



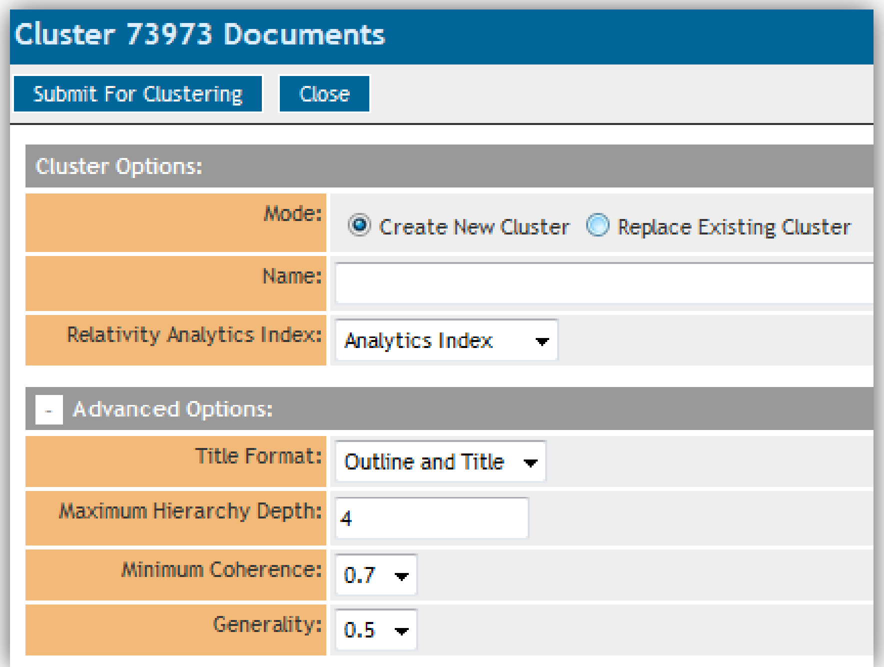
Cluster Options

First, select your Cluster Option:

- **Create New Cluster** creates a new cluster set.
- **Replace Existing Cluster** creates a new cluster set.

6.11.1 Create New Cluster

Selecting **Create New Cluster** brings up the options to create a new cluster set.

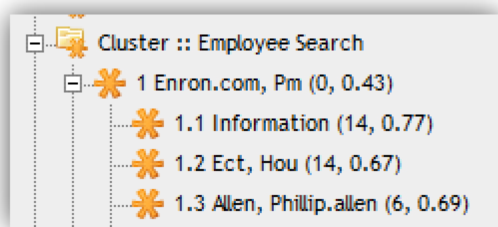


New Cluster Options

- **Name** is the name of the cluster set. This will be used to display the cluster set on the cluster browser.
- **Content analyst index** allows you to select which Relativity Analytics index you would like to use to cluster your documents

Advanced options can be accessed by clicking the "+".

- **Title format** sets how the clusters will be named.
  - Outline and title will show outline numbering, plus the cluster name.



Advanced Cluster Options

  - **Title only** will show only the title
    - In the above example, "Enron.com, Pm"
  - **Outline only** will show only the outline numbering.
    - In the above example, "1", "1.1", etc.

- **Maximum hierarchy depth** sets how many levels deep the cluster hierarchy can go. The default is 4 levels. A value of 1 will create only top-level clusters.
- **Minimum coherence** is how conceptually correlated the items must be to be included in the same cluster.
- **Generality** is the measure of how general the cluster will be, with 0 as the most general, and 1 being the most specific. The higher the generality setting, the fewer top-level settings will be created.

6.11.2 Replace Existing Cluster

Replace Existing Cluster is the same as Create a New Cluster set, except the results replace existing clustering options.

When you select **Replace Existing Cluster**, you are prompted to select the existing cluster set you would like to replace.

6.12 Process Transcripts

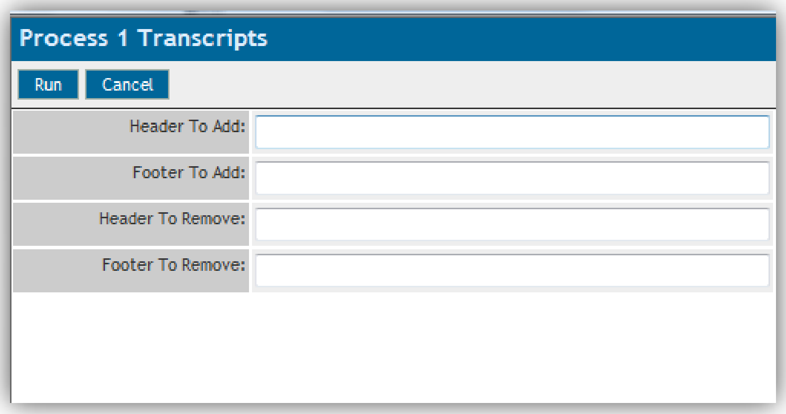
To work with transcripts, first load the transcripts into Relativity as you would any other type of native file. Relativity accepts only ASCII text transcripts.

> For organizational purposes, you may find it beneficial to create a folder called "transcripts" at the root of your workspace. You can store your transcripts in this folder. Additionally, you can add any subfolder options you would like.

Processing of a transcript will read the ASCII text file, identify page breaks, and parse out the content of the transcript into a hyperlinked word index for fast searching of the content.

On the item list, choose whether you'd like to process all searchable items, checked items, or items on in the current returned set

Then, ensure that **Process Transcripts** is selected in the dropdown. Click **Go**.



Process Transcripts Options

There are four options when processing a transcript, to control how the transcript appears in the viewer.

- **Header to add** allows you to add text to the header of each page. Added headers will show in viewer **preview** mode, and on printed versions of a transcript.
- **Footer to add** allows you to add text to the footer of each page. Added footers will show in viewer **preview** mode, and on printed versions of a transcript.
- **Header to remove** allows you to remove any existing headers.
- **Footer to remove** allows you to remove any existing footers.

> Court reporters often put a header or footer on each page of the transcript. This is an example of a header or footer that you might want to remove.

6.13 Create Word Index

Create word index creates a document-level, hyperlinked index of all words in a specific document. This functionality is available for the following document types:

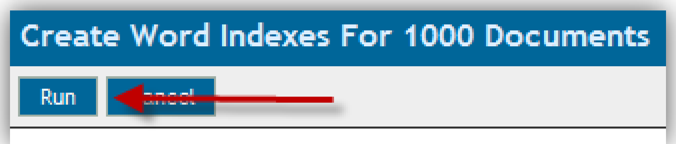
- .MSG
- .EML
- .TXT
- .XLS
- .XLSX
- .DOC
- .DOCX

- .PPT
- .PPTX
- .RTF
- .XML
- .PDF

On the item list, choose whether you'd like to process all searchable items, checked items, or these items in the current returned set.

Once you have selected the desired document set, select create word index, and click **Go.**

You are presented with a confirmation prompt.



Create Word Index Screen

Click **Run** to create the word indexes. Depending on the number of documents submitted and their size, this operation may take some time.

7 Disclaimer

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